

OP/B/AEP MEMORANDUM OF DISTRIBUTION

PDFFA 709

I. **OBLIGATION:** This is a partial x final award.
If this is a final obligation OP has no objection to the dereserving of any remaining funds.

II. **DOCUMENT INFORMATION:**

a) Obligating Document No.: _____
b) Order/Modification No.: BASIC
c) Request No.: Org: 10056 Req: 41
d) Request Amount: \$625,000
e) Instrument Amount: \$625,000
f) Dereserve: \$ 0 -
g) Incremental Funding Action: Yes No First Incremental to the
h) Buy-in: Yes No Basic award
i) Date document transmitted to recipient/grantee 02/21/97
j) Method of Financing (Check one only):
 Letter of Credit
 Periodic Advance
 x Direct Reimbursement

III. **PAYING OFFICE DISTRIBUTION:**

3-3-97 One original document signed by the Contracting Officer to FM for recording obligation. (FM/A/NPA/PA, Room 612, SA-2)
3-3-97 One copy to FM paying office. (FM/CMP/DC, Room 700, SA-2)
One copy to Mission paying Office. State Mission name, office symbol, and international mailing address.

IV. **TECHNICAL OFFICE DISTRIBUTION:**

Mission: _____
3-3-97 Technical Office: Lee White SA-18 Room 209D
Program Office _____

V. **OP DISTRIBUTION:**

3-3-97 One copy to M/OP/CIMS, Room 1469, SA-14 (include copy of all documents, e.g. Request, final obligating document signed by all parties)

VI. **CONTRACTOR/GRANTEE:**

3-3-97 One original document signed by all parties.
Contractor/Grantee Name: LTS Corporation
Contractor/Grantee Address: Bethesda Maryland

VII. **CONTRACT FILE:**

3-3-97 One original document signed by all parties.

VIII.

_____ All ASIA Actions to: Carrie Williams, ANE/ORAO, Rm. 3313A-NS
_____ All G Actions to: Angela Johnson, G/PDSP, Rm. 320-E, SA-18
_____ All G/DG Actions to: Patricia Allen, G/DG, Rm. 227, SA-2
3-3-97 All PPC/CDIE Actions to: Annette Braxton, PPC/CDIE, Rm. 220, SA-18
_____ Subcontracting Plans: OSDBU, Rm. 1200A, SA-14 (Include Subcontracting Plan w/copy of contract)
_____ All IQC Contracts: Overseas Contracting Officers (Electronic Copy)
_____ All IQC Contracts: Washington Contracting Officers (10 Copies)
_____ Other: _____

Contract Negotiator

Veronica G. Smith
Veronica G. Smith

Contracting Officer

Michael Gushue
Michael Gushue

Distributed by:

Veronica G. Smith
February 3, 1997
Located: u:\aep\docs\distrib

BEST AVAILABLE COPY

AWARD/CONTRACT		1 THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 350)		RATING		PAGE OF PAGES 1 45	
2 CONTRACT (Proc Inst Ident.) NO. AEP-C-00-97-00002-00		3 EFFECTIVE DATE 02/21/97		4 REQUISITION/PURCHASE REQUEST/PROJECT NO			
5 ISSUED BY USAID M/OP/B/AEP SA-14, Room 1539 Washington, DC 20523-1429		6 ADMINISTERED BY (If other than Item 5) USAID/PPC/CDIE/DI Lee White SA-18, Room 209E Washington, DC 20853		CODE			

7 NAME AND ADDRESS OF CONTRACTOR (No., street, city, county, State and ZIP Code) Logical Technical Services Corporation 7250 Woodmont Avenue, Suite 340 Bethesda, Maryland 20814		8 DELIVERY <input type="checkbox"/> FOB ORIGIN <input checked="" type="checkbox"/> OTHER (See below)	
9 DISCOUNT FOR PROMPT PAYMENT N/A		10 SUBMIT INVOICES (4 copies unless otherwise specified) TO THE ADDRESS SHOWN IN	
CEC: 13-063-753B TIN: 13:2626215		ITEM See Section G	

CODE		FACILITY CODE	
11 SHIP TO/MARK FOR See Section G		12 PAYMENT WILL BE MADE BY See Section G	

13 AUTHORITY FOR USING OTHER THAN FULL AND OPEN COMPETITION <input type="checkbox"/> 10 USC 2304(c)(1) <input type="checkbox"/> 41 USC 253(c)(1)		14 ACCOUNTING AND APPROPRIATION DATA See Section G	
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15A ITEM NO	15B SUPPLIES/SERVICES	15C QUANTITY	15D UNIT	15E UNIT PRICE	15F AMOUNT
CONTRACT TYPE: Cost-Plus Fixed Fee Completion					
	02/21/97 - 02/20/98 Basic Year			\$2,525,903 [TEC + Fee]	
	02/21/98 - 02/20/99 Option Year 1			\$2,367,413 [TEC + Fee]	
	02/21/99 - 02/20/00 Option Year 2			\$2,338,854 [TEC + Fee]	
	02/21/00 - 02/20/01 Option Year 3			\$2,365,750 [TEC + Fee]	
	02/21/01 - 02/20/02 Option Year 4			\$2,393,065 [TEC + Fee]	
Includes all Options Option (Add'l Services)				\$2,997,746 [TEC + Fee]	
15G. TOTAL AMOUNT OF CONTRACT					\$14,988,731

16. TABLE OF CONTENTS							
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CONTRACTING OFFICER WILL COMPLETE ITEM 17 OR 18 AS APPLICABLE

17. <input type="checkbox"/> CONTRACTOR'S NEGOTIATED AGREEMENT (Contractor is required to sign this document and return copies to issuing office.) Contractor agrees to furnish and deliver all items or perform all the services set forth or otherwise identified above and on any continuation sheets for the consideration stated herein. The rights and obligations of the parties to this contract shall be subject to and governed by the following documents: (a) this award/contract, (b) the solicitation, if any, and (c) such provisions, representations, certifications, and specifications, as are attached or incorporated by reference herein. (Attachments are listed herein.)		18. <input type="checkbox"/> AWARD (Contractor is not required to sign this document.) Your offer on Solicitation Number _____ including the additions or changes made by you which additions or changes are set forth in full above, is hereby accepted as to the items listed above and on any continuation sheets. This award consummates the contract which consists of the following documents: (a) the Government's solicitation and your offer, and (b) this award/contract. No further contractual document is necessary.	
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19A. NAME AND TITLE OF SIGNER (Type or print) JAMES R. BLOOMBERG, SR. Vice President		20A. NAME OF CONTRACTING OFFICER Michael Gushue	
19B. NAME OF CONTRACTOR BY <i>[Signature]</i> (Signature of person authorized to sign)		20B. UNITED STATES OF AMERICA BY <i>[Signature]</i> (Signature of Contracting Officer)	
19C. DATE SIGNED 2/24/97		20C. DATE SIGNED 2/24/97	

PART I - THE SCHEDULE

SECTION B - SUPPLIES OR SERVICES AND PRICES/COSTS

B.1. PURPOSE

The purpose of this contract is to provide access to a large body of worldwide, USAID produced & USAID funded, development literature & experiential information, as well as on-demand delivery for these documents and reports through the Development Experience Clearinghouse which manages the Development Experience System (DEXS), USAID's institutional memory system.

[End of Clause]

B.2. CONTRACT TYPE

This is a Cost-Plus-Fixed Fee (CPFF) completion contract. For the consideration set forth below, the Contractor shall provide the deliverables or outputs described in Attachment J-1 (Statement of Work) in accordance with the performance standards specified in Section E.

[End of Clause]

**B.3(a) ESTIMATED COST, FIXED FEE, and OBLIGATED AMOUNT
(02/21/97 - 02/20/98)**

- a) The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$2,405,622. The fixed fee, if any, is \$120,281. The estimated cost plus fixed fee, if any, is \$2,525,903.
- b) Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is \$625,000. The Contractor shall not exceed the aforesaid obligated amount.
- c) Funds obligated hereunder are anticipated to be sufficient through May 15, 1997.

[End of Clause]

**B.3(b) ESTIMATED COST, FIXED FEE, and OBLIGATED AMOUNT
(02/21/98 - 02/20/99) (OPTION YEAR 1)**

- a) The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$2,254,679. The fixed fee, if any, is \$112,734. The estimated cost plus fixed fee, if any, is \$2,367,413.
- b) Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is \$ TBD. The Contractor shall not exceed the aforesaid obligated amount.
- c) Funds obligated hereunder are anticipated to be sufficient through TBD.

[End of Clause]

**B.3(c) ESTIMATED COST, FIXED FEE, and OBLIGATED AMOUNT
(02/21/99 - 02/21/00) (OPTION YEAR 2)**

- a) The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$2,227,480. The fixed fee, if any, is \$111,374. The estimated cost plus fixed fee, if any, is \$2,338,854.
- b) Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is \$ TBD. The Contractor shall not exceed the aforesaid obligated amount.
- c) Funds obligated hereunder are anticipated to be sufficient through TBD.

[End of Clause]

**B.3(d) ESTIMATED COST, FIXED FEE, and OBLIGATED AMOUNT
(02/21/00 - 02/20/01) (OPTION YEAR 3)**

- a) The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$2,253,095. The fixed fee, if any, is \$112,655. The estimated cost plus fixed fee, if any, is \$2,365,750.

- b) Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is \$ TBD. The Contractor shall not exceed the aforesaid obligated amount.
- c) Funds obligated hereunder are anticipated to be sufficient through TBD.

[End of Clause]

**B.3(c) ESTIMATED COST, FIXED FEE, and OBLIGATED AMOUNT
(02/21/01 - 02/20/02) (OPTION YEAR 4)**

- a) The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$2,279,109. The fixed fee, if any, is \$113,955. The estimated cost plus fixed fee, if any, is \$2,393,065.
- b) Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is \$ TBD. The Contractor shall not exceed the aforesaid obligated amount.
- c) Funds obligated hereunder are anticipated to be sufficient through TBD.

[End of Clause]

**B.3(d) ESTIMATED COST, FIXED FEE, and OBLIGATED AMOUNT
(ADDITIONAL CLEARINGHOUSE SERVICES CONTRACT OPTION)**

- a) The estimated cost for the performance of the work required hereunder, exclusive of fixed fee, if any, is \$2,854,996. The fixed fee, if any, is \$142,750. The estimated cost plus fixed fee, if any, is \$2,997,746.
- b) Within the estimated cost plus fixed fee (if any) specified in paragraph (a) above, the amount currently obligated and available for reimbursement of allowable costs incurred by the Contractor (and payment of fee, if any) for performance hereunder is \$ TBD. The Contractor shall not exceed the aforesaid obligated amount.

- c) Funds obligated hereunder are anticipated to be sufficient through TBD.

[End of Clause]

B.4 ESTABLISHMENT OF INDIRECT COST RATE

The contract clause entitled "Allowable Cost and Payment" specifies that the indirect cost rates shall be established for each of the Contractor's accounting periods which apply to this contract. Pending establishment of revised provisional, final or revised predetermined indirect cost rates for each of the Contractor's account periods which will apply to this contract, payment on account of allowable indirect costs shall be made on the basis of the following negotiated provisional or predetermined rates applied to the bases which are set forth below:

Description	Rate	Base	Type	Period
<i>Divisional Overhead</i>	<i>43%</i>	<i>Direct Labor</i>	<i>Provisional</i>	<i>11/1/96-10/31/97</i>
<i>Combined G&A</i>	<i>17%</i>	<i>Total Direct</i>	<i>Provisional</i>	<i>11/1/96-10/31/97</i>

[End of Clause]

[END OF SECTION B]

SECTION C - DESCRIPTION/SPECIFICATIONS/WORK STATEMENT

C.1. STATEMENT OF WORK/SPECIFICATIONS

The Contractor shall furnish the necessary personnel, material, equipment, service and facilities (except as otherwise specified), to perform the Statement of Work/Specifications referenced in Section J-1.

[END OF SECTION C]

SECTION D

SECTION D - PACKAGING AND MARKING

D.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (JUN 1988)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available.

I. AID ACQUISITION REGULATION (48 CFR CHAPTER 7) CLAUSES

NUMBER	TITLE	DATE
752.7009	MARKING	JAN 1993
752.7026	REPORTS	OCT 1989

[End of Clause]

[END OF SECTION D]

SECTION E - INSPECTION AND ACCEPTANCE

E.1. 52.252-2 CLAUSES INCORPORATED BY REFERENCE (JUN 1988)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the contracting Officer will make their full text available.

I. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) CLAUSES

NUMBER	TITLE	DATE
52.246-5	INSPECTION OF SERVICES - COST-REIMBURSEMENT	APR 1984

[End of Clause]

E.2. INSPECTION AND ACCEPTANCE

USAID inspection and acceptance of services, reports and other required deliverables or outputs shall take place at:

United States Agency for International Development
PPC/CDIE/DI (ATTN: Mr. Lee White)
SA-18, Room 209D
Washington, DC 20523

or at any other location where the services are performed and reports and deliverables or outputs are produced or submitted. The COTR listed in Section G has been delegated authority to inspect and accept all services, reports and required deliverables or outputs.

[End of Clause]

E.3. RESPONSIBLE OFFICIAL

In accordance with the clauses of this contract entitled, "Inspection of Services - Cost Reimbursement" FAR 52.246-05 and "Limitation of Liability - Services" FAR 52.246-25, inspection and acceptance of all services and supplies required hereunder shall be made by the Contracting Officer's Technical Representative (see Section G.3 of this contract). Inspection and acceptance of services and supplies by the COTR shall form the basis for payments to the Contractor.

E.4 MONITORING AND EVALUATION

CDIE will monitor and evaluate this contract. This will include, but is not limited to the following: detailed assessment of contractor performance, contractor organization and management, field work, etc.; and evaluation of whether the objectives of the contract are being met; whether there is satisfactory progress; if staff members are effective, and to alert the Contractor to any potential problems. The cost of this external evaluation of the contract will be covered by USAID, and will not be charged against the contract.

E.5 PERFORMANCE-BASED MEASURES FOR DEVELOPMENT EXPERIENCE CLEARINGHOUSE

The Development Experience Clearinghouse contract is a performance-based contract. A set of performance indicators, outlined below, shall be used by CDIE/DI to monitor and evaluate the contractor's performance over several different functional areas of the contract. CDIE/DI will hold informal quarterly and annual performance reviews with the Clearinghouse contract management. The Clearinghouse contractor shall prepare three quarterly, and one annual, management and performance reports for CDIE/DI review.

Each report will address the specific workload measures, performance indicators and the following additional areas of the contract: contract accomplishments for the quarter just completed, problems encountered in the last quarter with solutions found or proposed, significant events initiated or continued during the quarter, significant trends in the number and types of requestors, services provided, response times, service request backlogs, and examples of the most significant and unusual requests. The contractor shall be responsible for generating and maintaining all service statistics associated with the Clearinghouse contract to produce quarterly and annual summary statistic reports on a fiscal year basis.

The CDIE/DI COTR will provide written comment and critique to these reports and forward them to the M/OP Contracting Officer for comment and approval. Clearinghouse contract management shall have a 30-day response period to address issues in the specific areas related to poor contract performance, provide explanatory evidence vis-a-vis perceived shortfalls in the contractor's performance, and outline a proposed plan of improvements to deficient areas.

There shall be an independent external evaluation of the contract funded by USAID, beginning in the 36th month of the contract, which shall rely on much of the performance-based information collected in the areas outlined below. The evaluation, however, shall go beyond performance-based issues and shall address issues related to the most cost-effective clearinghouse service approaches for acquiring, processing, accessing, publishing and disseminating development experience information for CDIE/DI's principal development audiences.

Performance-based measures for the Clearinghouse contract are presented in the tables below. Performance-based measures have been defined in the following Clearinghouse contract functional areas.

- (1) Acquiring Development Experience Materials
- (2) Processing Development Experience Materials
- (3) Information Dissemination of Development Experience
- (4) Responding to Development Experience Requests
- (5) Records Management Service
- (6) Management and Administration

The tables are arranged in three columns. The first column defines the performance indicator for the function. The second column defines the data source(s) which shall be used by CDIE/DI to monitor and review R&RS contract performance. The third column defines an acceptable level of contractor performance for the particular performance indicator.

E.5.1. ACQUIRING DEVELOPMENT EXPERIENCE MATERIALS PERFORMANCE INDICATORS

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
Active and viable Bureau/Mission acquisitions program	<ul style="list-style-type: none"> * DEC monthly acquisitions reports. * Copies of acquisitions staff correspondence. * DEXS authority files. * DEXS document tracking information. * Periodic survey of acquisitions staff. 	<ul style="list-style-type: none"> * Routine document submissions from 80% of USAID Bureaus and Missions. * Periodic communications with R&RS analyst staff to promote program and acquire USAID documents. * Program and design documents acquired within one year of publication for 80% of active USAID development activity portfolio. * 80% of USAID evaluation reports acquired within one year of publication.
Active and viable contractor liaison program	<ul style="list-style-type: none"> * DEC monthly acquisitions reports. * Copies of acquisitions staff correspondence. * DEXS document tracking information. * Periodic survey of contractor network. 	<ul style="list-style-type: none"> * Active network of at least 150 principal USAID contractors maintained. * Regular report submissions from 80% of the contractors in this network received. * 80% of USAID contractor reports acquired within one year of publication.

**E.5.2. PROCESSING DEVELOPMENT EXPERIENCE MATERIALS FUNCTION
PERFORMANCE INDICATORS**

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
Quality of Development Experience Material Selection	<ul style="list-style-type: none"> * DEXS Databases. * CDIE Online Home Page. * Customer Surveys. 	<p>*80% of recent, significant Agency development experience reports and publications are accessible through DEXS and CDIE Online Home Page.</p> <p>* DEC, DEXS and CDIE OnLine Home Page is viewed by most Agency staff as principle source for USAID development experience information.</p>
Timeliness of Processing	<p>DEXS Database Statistics. DEC Management Information System.</p>	<p>* Current Agency development experience reports are accessible through DEXS, on average, within 7 days of receipt by clearinghouse.</p>
Accuracy and Completeness of Development Experience Materials Processing	<ul style="list-style-type: none"> * DEXS Databases. * USAID Documents and Reports. * Customer Survey. * Search strategy tests. 	<p>* Precision: 95% of recently processed materials can be correctly identified and accessed through standard bibliographic and keyword search techniques in key Agency strategic program areas.</p>

Quality of Development Experience Summaries	<ul style="list-style-type: none"> * DEXS Databases. * USAID Documents and Reports. * Customer Surveys. 	<ul style="list-style-type: none"> * All summaries accurately reflect documented development experience such as: significant development activity or program strategies, methods and approaches; experiential findings, conclusions, and lessons learned; and program objectives, performance measures and development results.
Quality of Scanned Development Experience Reports	<ul style="list-style-type: none"> * DEXS Database. * USAID Documents and Reports. * Customer Surveys. 	<ul style="list-style-type: none"> * Scanned document images are still legible (1) electronically, when viewed on a VGA-quality computer workstation screen and (2) in paper, when reproduced from an electronic image to print format. (It is understood that the quality of scanned images will only be equal to the original source document and the scanner resolution used.)
Electronic Documents Received and Processed	<ul style="list-style-type: none"> * DEXS Database. 	<ul style="list-style-type: none"> * Each year the clearinghouse shall meet or exceed its target to receive and process 500 additional electronic documents.
Precision and Comprehensiveness of USAID Thesaurus	<ul style="list-style-type: none"> * USAID Thesaurus. * Customer Surveys. 	<ul style="list-style-type: none"> * The USAID Thesaurus shall include detailed and comprehensive subject coverage of all significant Agency strategic program areas. * The USAID Thesaurus shall include detailed and comprehensive regional and country coverage for all USAID-assisted geographical areas.

**E.5.3. INFORMATION DISSEMINATION OF DEVELOPMENT EXPERIENCE
FUNCTION PERFORMANCE INDICATORS**

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
Accessibility of Development Experience	<ul style="list-style-type: none"> * DEXS Databases * CDIE OnLine Home Page. * Customer Surveys. 	<ul style="list-style-type: none"> * Each DEXS database shall be made accessible through pre-canned search strategies and simple end-user search menu screens. * Each DEXS database shall provide search menu screens for experienced searchers. * CDIE OnLine Home Page is user friendly and facilitates access to all current and historical Agency development experience. * CDIE OnLine Home Page use increases by 25% each year.

<p>Accessibility of Electronic Development Documents</p>	<ul style="list-style-type: none"> * DEXS databases. * CDIE OnLine Home Page. * Customer Surveys. 	<ul style="list-style-type: none"> * CDIE customers increase their use of electronic (vs. paper) documents by 25% each year. * All recent, significant Agency publications are accessible in electronic form through DEXS and CDIE OnLine Home Page. * All recent, significant CDIE publications, reports, studies, bibliographies, acquisitions lists, statistical data reports, issues briefs, etc. are accessible in electronic form through DEXS and CDIE OnLine Home Page.
<p>Effectiveness of CDIE OnLine Home Page</p>	<ul style="list-style-type: none"> * CDIE OnLine Home Page Statistics. * Customer Feedback. 	<ul style="list-style-type: none"> * CDIE customer use of home page increases by 25% each year. * 25% more CDIE customers each year use home page to learn what is new at CDIE. * CDIE customers increasingly turn to CDIE OnLine home page as their principal tool to access and learn from the Agency's experience.
<p>Quality of dissemination product, e.g. special bibliography.</p>	<ul style="list-style-type: none"> * User survey results. * Customer feedback. 	<ul style="list-style-type: none"> * User receives information which is current, appropriate and responsive to his/her needs.

Clearinghouse has an active and effective outreach and dissemination program.	<ul style="list-style-type: none"> * Clearinghouse outreach agenda. * Client feedback. 	<ul style="list-style-type: none"> * Strong USAID staff demand generated from Clearinghouse outreach services and products. * Additional requests by patrons for future topics and products.
Clearinghouse products are current and timely.	<ul style="list-style-type: none"> * Products produced, distributed and made accessible. 	<ul style="list-style-type: none"> * Clearinghouse products are issued on schedule 90% of the time. * Source content of products is consistent with present USAID priority program areas and issues.
Clearinghouse communication products are extensively used and relevant to USAID staff.	<ul style="list-style-type: none"> * Client feedback. * Customer survey. 	<ul style="list-style-type: none"> * Clearinghouse products generate significant additional demand for Agency institutional memory resources.
Effectiveness of CD-DEXS CD-ROM	<ul style="list-style-type: none"> * CD-DEXS CD-ROM. * Customer feedback. 	<ul style="list-style-type: none"> * CD-ROM product is acceptable alternative for off-line users of Agency's institutional memory.

**E.5.4. RESPONDING TO DEVELOPMENT EXPERIENCE REQUESTS FUNCTION
PERFORMANCE INDICATORS**

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
Timely turnaround of responses.	<ul style="list-style-type: none"> * Client feedback. * Clearinghouse user register. * User survey results. 	<ul style="list-style-type: none"> * Complete processing priority I user requests within 1 workday of receipt. * Complete processing priority II user requests within 3 workdays of receipt. * Complete processing priority III user requests within 5 workdays of receipt.
Service is effective and facilitates user access to information resources.	<ul style="list-style-type: none"> * MBWA. * Clearinghouse user register. * User survey results. 	<ul style="list-style-type: none"> * Service is courteous and helpful. * Many repeat users. * 95% of users are satisfied with quality of service. * Broad base of Bureau and Mission staff users. * Wide range of information needs fulfilled.
Clearinghouse products and services are a key resource for conducting USAID business.	<ul style="list-style-type: none"> * Client feedback. * Clearinghouse user statistics. * CDIE OnLine Home Page user statistics. * User survey results. 	<ul style="list-style-type: none"> * Increasing use of clearinghouse products and services. * Increasing use of CDIE OnLine Home Page by USAID staff and contractors. * Institutional memory collection relevant and current to USAID programs.

E.5.5. RECORDS MANAGEMENT SERVICE FUNCTION PERFORMANCE INDICATORS

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
Effective and accurate processing of records management documents.	<ul style="list-style-type: none"> * Monthly management reports. * Bureau contacts by M/AS/ISS. * CD-ROMs distributed to specified bureau/offices. 	<ul style="list-style-type: none"> * 12 workday turnaround for distributing CDs. * Document scanning standard for 100% accuracy & quality control is met.
Project Documents Database effectively maintained and actively used.	<ul style="list-style-type: none"> * Monthly and annual data reports. * Home page user statistics for database access. 	<ul style="list-style-type: none"> * Database provides sufficient and accurate detail to access all project documents and account for monthly scanning activity. * Number of user accesses increases by 25% each year.
Scanned hardcopy, electronic and microfiche documents are adequately monitored and controlled.	<ul style="list-style-type: none"> * Monthly reports. * Submission of report for retirement of paper, microfiche, magnetic tapes or other media forms to NARA. 	<ul style="list-style-type: none"> * 100% of documents received by clearinghouse, and produced electronic and microfiche copies are effectively managed and controlled. * NARA acceptance of retired documentation .
Client Satisfaction	<ul style="list-style-type: none"> *Bureau contacts. * Monthly reports. *Client feedback. *User survey results. 	<ul style="list-style-type: none"> * Bureau funding commitments continue. * CD usage numbers increases at bureau/office workstations. * Service is well received by Bureau staff and target audiences. *Demand for products and services remains strong, grows and/or become more sophisticated.

Effective conversion of document images to COM Fiche for Retirement to NARA	<ul style="list-style-type: none"> * M/AS/ISS reports on conversion activity status. 	<ul style="list-style-type: none"> * Quality control standard satisfied by contractor. * NARA acceptance of COM Fiche as Agency permanent records.
Effective publication and use of Automated Directives Systems	<ul style="list-style-type: none"> * ADS CD-ROMS. * Number of CDs shipped to external customers outside of the Agency. * User survey results. 	<ul style="list-style-type: none"> * ADS CD-ROM is user-friendly. * Survey results indicate overall customer satisfaction. * ADS production schedule is met.
Effective records management training for Agency staff.	<ul style="list-style-type: none"> * Scheduled group or individual training on use of CDs or Internet to access online Project database. * User survey after training. * Request for training by Agency staff. * Brochures, instruction manuals or training materials. 	<ul style="list-style-type: none"> * Users clearly understand purpose, function and application of records management program and Project Documents Database. * Users satisfied with training program and materials.

E.5.6. MANAGEMENT AND ADMINISTRATION FUNCTION PERFORMANCE INDICATORS

PERFORMANCE INDICATOR	DATA SOURCE	ACCEPTABLE PERFORMANCE
Responsive MIS to meet CDIE/DI reporting needs.	*Quarterly and annual MIS data reports.	<ul style="list-style-type: none"> * MIS quarterly and annual data reports are available within 30 days after the close of the reported time period. * MIS data provides sufficient detail to account for 90% of clearinghouse staff activity.
Provide accurate and timely financial accounting data.	<ul style="list-style-type: none"> * Monthly financial management reports. * Public voucher statements. 	<ul style="list-style-type: none"> * Financial reports provided within 30 days after completion of previous month's services 95% of the time. * Financial reports are 100% accurate with final public voucher statements 95% of the time.
Staff effectively trained and stay current in their specializations.	* Quarterly clearinghouse management reports.	<ul style="list-style-type: none"> * Clearinghouse staff is viewed by the Agency as the lead USAID contractor in effective dissemination of electronic Agency development experience information resources. * Clearinghouse staff receive regular training on latest information access, dissemination and records management tools for development experience information resources. * Clearinghouse staff are kept current on recent development trends and issues.

<p>Client Bureau or Mission satisfaction.</p>	<ul style="list-style-type: none"> * Bureau or Mission buy-ins. * Client feedback. * User survey results. * Monthly and quarterly progress reports. 	<ul style="list-style-type: none"> * Funding commitments continue. * Service is well received by Bureau or Mission staff and target audiences. * Demand for products and services remains strong, grows and/or becomes more sophisticated. * Target audience becomes reliant on service for satisfying critical information needs.
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[END OF SECTION E]

SECTION F - DELIVERIES OR PERFORMANCE

F.1. 52.252-2 CLAUSES INCORPORATED BY REFERENCE (JUN 1988)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available.

I. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) CLAUSES

NUMBER	TITLE	DATE
52.242-15	STOP-WORK ORDER Alternate I (APR 1984)	AUG 1989

[End of Clause]

F.2. PERIOD OF PERFORMANCE

The period of performance for this contract is 02/21/97 through 02/20/98. The period of performance for option periods, if any, is:

OPTION PERIOD 1	02/21/98 through 02/20/99
OPTION PERIOD 2	02/21/99 through 02/20/00
OPTION PERIOD 3	02/21/00 through 02/20/01
OPTION PERIOD 4	02/21/01 through 02/20/02

[End of Clause]

F.3. Key Personnel

The key personnel identified below are considered essential to the work being performed. Unless otherwise agreed to in writing by the Contracting Officer, the Contractor shall be responsible for providing such personnel for performance. Failure to provide key personnel designated below may be considered nonperformance by the Contractor unless such failure is beyond the control, and through no fault or negligence of the Contractor. The contractor shall immediately notify the Contracting Officer and the COTR of any Key Personnel's departure and the reasons therefor. The Contractor shall take steps to immediately rectify this situation and shall propose a substitute candidate for each vacated

position along with a budget impact statement in sufficient detail to permit evaluation of the impact on the program. No replacement of personnel shall be made by the Contractor without the written consent of the Contracting Office whether provided in advance or by ratification.

Project Director
Operations Manager
Records Management Supervisor

[End of Clause]

[END OF SECTION F]

SECTION G

SECTION G - CONTRACT ADMINISTRATION DATA

G.1. 52.252-2 CLAUSES INCORPORATED BY REFERENCE (JUN 1988)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available.

**FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) CLAUSES
AND AID ACQUISITION REGULATION (48 CFR CHAPTER 7) CLAUSES**

NUMBER	TITLE	DATE
752.7003	DOCUMENTATION FOR PAYMENT	APR 1984

[END OF CLAUSE]

G.2. ADMINISTRATIVE CONTRACTING OFFICE

The Administrative Contracting Office is:

United States Agency for International Development
ATTN: Veronica G. Smith
OP/B/AEP, SA-14, Room 1539
Washington, D.C. 20523

Telephone: 703 875-1026

[END OF CLAUSE]

G.3. CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE (COTR)

The Contracting Officer's Technical Representative is Mr. Lee White or his designee at:

United States Agency for International Development
PPC/CDIE/DI
SA-18, Room 209D
Washington, DC 20523-1802

Telephone: 703 875-4970

[END OF CLAUSE]

G.4. TECHNICAL DIRECTIONS/RELATIONSHIP WITH USAID

(a) Technical Directions is defined to include:

(1) Written directions to the Contractor which fill in details, suggest possible lines of inquiry, or otherwise facilitate completion of work;

(2) Provision of written information to the Contractor which assists in the interpretation of drawings, specifications, of technical portions of the work statement;

(3) Review and, where required, provide written approval of technical reports, drawings, specifications, or technical information to be delivered. Technical directions must be in writing, and must be within the scope of the work as detailed in Section C.

(b) The COTR is authorized by designation to take any or all action with respect to the following which could lawfully be taken by the Contracting Officer, except any action specifically prohibited by the terms of this Contract.

(1) Assure that the Contractor performs the technical requirements of the contract in accordance with the contract terms, conditions, and specifications.

(2) Perform or cause to be performed, inspections necessary in connection with a) above and require the contractor to correct all deficiencies; perform acceptance for the Government.

(3) Maintain all liaison and direct communications with the Contractor. Written communications with the Contractor and documents shall be signed as "Contracting Officer's Technical Representative" with a copy furnished to the Contracting Officer.

(4) Issue written interpretations of technical requirements of Government drawings, designs, and specifications.

(5) Monitor the Contractor's production or performance progress and notify the Contractor in writing of deficiencies observed during surveillance, and direct appropriate action to effect correction. Record and report to the Contracting Officer incidents of faulty or nonconforming work, delays or problems.

(6) Obtain necessary security clearance and appropriate identification if access to Government facilities is required. If to be provided, ensure that Government furnished property is available when required.

LIMITATIONS: The COTR is not empowered to award, agree to or sign any contract (including delivery or purchase orders) or modification thereto, or in any way to obligate the payment of money by the Government. The COTR may not take any action which may impact on the contract schedule, funds, scope or rate of utilization of LOE. All contractual agreements, commitments, or modifications which involve price, quantities, quality, schedules shall be made only by Contracting Officer.

(c) The COTR is required to meet quarterly with the Contractor and the Contracting Officer concerning performance of items delivered under this contract and any other administration or technical issues. Telephonic reports may be made if no problems are being experienced. Problem areas should be brought to the immediate attention of the Contracting Officer.

(d) In the absence of the designated COTR, the COTR may designate someone to serve as COTR in their place. However, such action to direct an individual to act in the COTR's stead shall immediately be communicated to the Contractor and the Contracting Officer.

(e) Contractual Problems - Contractual problems, of any nature, that may arise during the life of the contract must be handled in conformance with specific public laws and regulations (i.e. Federal Acquisition Regulations and Agency for International Development

Acquisition Regulation). The Contractor and the COTR shall bring all contracting problems to the immediate attention of the Contracting Officer. Only the Contracting Officer is authorized to formally resolve such problems. The Contracting Officer will be responsible for resolving legal issues, determining contract scope and interpreting contract terms and conditions. The Contracting Officer is the sole authority authorized to approve changes in any of the requirements under this contract. Notwithstanding any clause contained elsewhere in this contract, the said authority remains solely with the Contracting Officer. These changes include, but will not be limited to the following areas: scope of work, price, quantity, technical specifications, delivery schedules, and contract terms and conditions. In the event the Contractor effects any changes at the direction of any person other than the Contracting Officer, the change will be considered to have been made without authority.

(f) Failure by the contractor to report to the Administrative Contracting Office, any action by the Government considered to be a change, within the specified number of days contained in FAR 52.243-7 (Notification of Changes), waives the Contractor's right to any claims for equitable adjustments.

[End of Clause]

G.5 PAYING OFFICE

The paying office for this contract is:

USAID
M/FM/CMPD/DC
SA-2, Room 700
Washington, DC 20523-0209

[End of Clause]

G.6 ACCOUNTING AND APPROPRIATION DATA

Request No. Org: 10056
Req: 41

Account No: DV96/97TDV697
Commitment: \$625,000

[End of Clause]

SECTION H

SECTION H - SPECIAL CONTRACT REQUIREMENTS

H.1. AIDAR 752.7032 INTERNATIONAL TRAVEL APPROVAL AND NOTIFICATION REQUIREMENTS AND AIDAR 752.7027 PERSONNEL

In accordance with the above clauses, the Contracting Officer hereby provides prior written approval for international travel, provided that concurrence with the assignment of individuals outside the United States is obtained by the Contractor, in writing, from the COTR prior to their assignment abroad, which must be within the terms of this contract, is subject to availability of funds, and should not be construed as authorization either to increase the estimated cost or to exceed the obligated amount (see Section B). The Contractor shall retain for audit purposes a copy of each travel concurrence.

[End of Clause]

H.2. INSURANCE AND SERVICES

(a) Pursuant to AIDAR 752.228-3 Worker's Compensation Insurance (Defense Base Act); USAID's DBA Insurance carrier is:

Wright and Company
1400 I Street, NW Suite 1100
Washington, DC 20005
Telephone (202) 289-0200 or (800) 424-9801

outside the Washington area (toll free) telefax: (202) 289-6607

(b) Pursuant to AIDAR 752.228-70 Medical Evacuation (MEDEVAC) Services, USAID's Medevac service provider is:

Medex Assistance Corporation
P.O. Box 5375
Timonium, MD 21094-5375
Telephone: (410) 453-6300 in Maryland;
or (800) 537-2029 (toll free)
Telefax: (410) 453-6301

Applicants should request coverage in accordance with USAID Contract No. FAO-0000-Q-00-2041-00. Medevac services costs are allowable as a direct cost.

[End of Clause]

H.3. AUTHORIZED GEOGRAPHIC CODE

The authorized geographic code for procurement of goods and services under this contract is 000 (United States).

[End of Clause]

H.4. LOGISTIC SUPPORT

(a) The Contractor shall be responsible for furnishing all logistic support in the United States and overseas.

(b) To the extent that a USAID Mission or an Office of the AID Representative (OAR) in the cooperating country, or a cooperating country, furnishes logistic support for the contractor's overseas performance, the costs of such logistic support will not be charged to the Contractor, and shall not be charged by the Contractor to this contract. Logistic support furnished in the form of local currency shall be paid to the Contractor in a manner adapted to the local situation and as agreed to by the Mission Director or USAID Representative (USAIDREP), in writing. The documentation for such costs shall be on such forms and in such manner as the Mission Director/USAID REP shall prescribe.

(c) If, under emergency circumstances, it is necessary for a USAID Mission or OAR to pay for any in-country costs on behalf of the Contractor in order to implement any activities under this contract, the Mission may bill the contractor for such cost, and the Contractor may, in turn, charge those costs against this contract (however, see Section H.4.(b), wherein logistic support to be furnished by the Mission/OAR will be furnished without charge). The Mission/OAR will never recoup those costs via an Advice of Charge (AOC) to the paying office. A Mission may not pay any in-country costs without the prior written approval of the Contractor, which approval must indicate a maximum amount that may be paid.

[End of Clause]

H.5 ORGANIZATIONAL CONFLICT OF INTEREST

(a) It is understood and agreed that some of the work required hereunder may place the contractor, or its personnel or its subcontractors of their personnel (hereinafter referred to

collectively as "Contractor), in the position of having a potential organization conflict of interest (OCI), i.e., potential because of other activities or relationship with other persons, (1) the contractor is unable or potentially unable to render impartial assistance or advice; or (2) the Contractor's objectivity in performing the contract is or might be impaired; or (3) the Contractor may receive an unfair competitive advantage. Further discussion of OCIs may be found in FAR 9.5.

(b) The performance/actions of personnel under this contract will be imputed to the contractor (or subcontractor) by whom they are employed or retained, and the performance/actions of any subcontractor will be imputed to the Contractor, unless the Contractor, on a case-by-case basis, can demonstrate otherwise and satisfy the Contracting Officer that such imputation is unreasonable.

(c) Pursuant to the clause of this contract entitled "Organizational Conflicts of Interest Discovered After Award" (AIDAR 752.209-71), the contractor agrees not to undertake any activity which may involve an OCI without first notifying the Contracting Officer, of such potential OCI and receiving the Contracting Officer's authorization to undertake that activity.

(d) If the OCI relates to performance of the work hereunder (e.g. where the contractor is to evaluate an activity in which the Contractor has some previous involvement, thereby rendering the Contractor unable or potentially unable to provide impartial assistance or advice, or impairing or potentially impairing the Contractor's objectivity), and the Contracting Officer cannot neutralize, mitigate, or avoid the OCI, the Contracting Officer may decline to authorize performance of that work by the Contractor.

(e) If the OCI relates to future activities (e.g., where the Contractor is to perform a needs assessment, feasibility study, or design/development of a project or activity, in which the Contractor will or might be involved under this contract or the core contract, thereby rendering the Contractor unable or potentially unable to provide impartial assistance or advice, or impairing or potentially impairing the contractor's objectivity; or where the Contractor is to perform a needs assessment, feasibility study or design/development of a project or activity to be procured under another contract for which the Contractor will or might compete or which may be awarded noncompetitively to the Contractor, thereby potentially providing an unfair competitive advantage to the Contractor, and/or rendering the Contractor unable or potentially unable to provide impartial assistance or advice, or impairing or potentially impairing the Contractor's objectivity); or where the Contractor is to evaluate

an activity, the Contracting Officer may decline to authorize performance of that work by the Contractor or, if such work is authorized, the contracting Officer may place restrictions on the Contractor's future activities, as permitted by FAR 9.5, and as necessary to neutralize, mitigate, or avoid the OCI.

(f) If it is discovered that the Contractor engaged in any activities which constitute an OCI without having first obtained the Contracting Officer's approval to undertake such activities, or if it is subsequently discovered that, notwithstanding the Contracting Officer's authorization to undertake the activity based on his/her initial determination that no significant potential OCI existed or appeared to exist, and OCI did, in fact, exist or arise, restrictions, as permitted by FAR 9.5, on the Contractor's future activities may be placed unilaterally by the Contracting Officer for this contract or the Contracting Officer for such other contracts as may be involved in the OCI, and other remedies (including termination of this contract for default, debarment or suspension, and those permitted by the clause of this contract entitled "Price or Fee Adjustment for Illegal or Improper Activity" (FAR 52.203-10) for violations of Section 27 of the Office of Federal Procurement Policy Act [41 U.S.C.425], as amended by Section 814 of Pub. L. 101-18900, may be taken by USAID.

(g) If it is discovered that the contractor engaged in any activities in violation of the restrictions placed by a Contracting Officer on the Contractor's future activities, other remedies (including termination of this contract for default, debarment or suspension, and those permitted by the clause of this contract entitled "Price or Fee Adjustment for Illegal or Improper Activity" [FAR 52.203-10] for violations of the Section 27 of the Office of Federal Procurement Policy Act [41 U.S.C. 423], as amended by Section 814 of Pub L. 101-189), may be taken by USAID.

(h) Nothing in this provision precludes the application of any other remedies available to USAID by law, regulation or other provisions of this contract.

[End of Clause]

**H.6. RELOCATION OF U.S. BUSINESS, ASSISTANCE TO EXPORT
PROCESSING ZONES, INTERNATIONALLY RECOGNIZED WORKERS
RIGHTS (JANUARY 1994)**

(a) No funds or other support provided hereunder may be used in a project or activity reasonably likely to involve the relation or expansion outside of the United States of an enterprise located in the United States if non-U.S. production in such relations or expansion replaces some or all of the production of, and reduces the number of employees at, said enterprise in the United States.

(b) No funds or other support provided hereunder may be used in a project or activity the purpose of which is the establishment or development in a foreign country of any export processing zone or designated area where the labor, environmental, tax, tariff and safety laws of the country would not apply, without the prior written approval of USAID.

(c) No funds or other support provided hereunder may be used in an activity which contributes to the violation of internationally recognized rights of workers in the recipient country, including those in any designated zone or areas in that country.

(d) This provision must be included in all subcontract.

[End of Clause]

[END OF SECTION H]

SECTION I

PART II - CONTRACT CLAUSES

SECTION I - CONTRACT CLAUSES

I-1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (JUN 1988)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available.

I. FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) CLAUSES

NUMBER	TITLE	DATE
52.202-1	DEFINITIONS	OCT 1995
52.203-3	GRATUITIES	APR 1984
52.203-5	COVENANT AGAINST CONTINGENT FEES	APR 1984
52.203-6	RESTRICTIONS ON SUBCONTRACTORS SALES TO THE GOVERNMENT	OCT 1995
52.203-7	ANTI-KICKBACK PROCEDURES	JUL 1995
52.203-9	REQUIREMENT FOR CERTIFICATE OF PROCUREMENT INTEGRITY--MODIFICATION	SEP 1995
52.203-10	PRICE OR FEE ADJUSTMENT FOR ILLEGAL OR IMPROPER ACTIVITY	SEP 1990
52.203-12	LIMITATION ON PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS	JAN 1990
52.203-13	PROCUREMENT INTEGRITY - SERVICE CONTRACTING	SEP 1990
52.204-2	SECURITY REQUIREMENTS	APR 1984
52.204-4	PRINTING/COPYING DOUBLE-SIDED ON RECYCLED PAPER	MAY 1995
52.209-6	PROTECTING THE GOVERNMENT'S INTEREST WHEN SUBCONTRACTING WITH CONTRACTORS DEBARRED, SUSPENDED, OR PROPOSED FOR DEBARMENT	AUG 1995
52.215-2	AUDIT AND RECORDS--NEGOTIATION	OCT 1995
52.215-22	PRICE REDUCTION FOR DEFECTIVE COST OR PRICING DATA	OCT 1995
52.215-23	PRICE REDUCTION FOR DEFECTIVE COST OR PRICING DATA - MODIFICATIONS	OCT 1995
52.215-24	SUBCONTRACTING COST OR PRICING DATA	OCT 1995
52.215-25	SUBCONTRACTOR COST OR PRICING DATA - MODIFICATIONS	OCT 1995

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52.215-27	TERMINATION OF DEFINED BENEFIT PENSION PLANS	MAR 1996
52.215-30	FACILITIES CAPITAL COST OF MONEY	SEP 1987
52.215-31	WAIVER OF FACILITIES CAPITAL COST OF MONEY	SEP 1987
52.215.33	ORDER OF PRECEDENCE	JAN 1986
52.215-39	REVERSION OR ADJUSTMENT OF PLANS FOR POSTRETIREMENT BENEFITS OTHER THAN PENSIONS (PRB)	MAR 1996
52.215-40	NOTIFICATION OF OWNERSHIP CHANGES	FEB 1995
52.216-7	ALLOWABLE COST AND PAYMENT	JUL 1991
52.216-8	FIXED FEE	APR 1984
52.217-1	LIMITATION OF PRICE AND CONTRACTOR OBLIGATIONS	APR 1984
52.217-2	CANCELLATION OF ITEMS Alternate I (APR 1984)	APR 1984
52.217-8	OPTION TO EXTEND SERVICES	AUG 1989
52.217-9	OPTION TO EXTEND THE TERM OF THE CONTRACT	MAR 1989
52.219-8	UTILIZATION OF SMALL, SMALL DISADVANTAGED AND WOMEN-OWNED SMALL BUSINESS CONCERNS	OCT 1995
52.219-14	LIMITATIONS ON SUBCONTRACTING	JAN 1991
52.222-3	CONVICT LABOR	APR 1984
52.222-26	EQUAL OPPORTUNITY	APR 1984
52.222-28	EQUAL OPPORTUNITY PREAWARD CLEARANCE OF SUBCONTRACTS	APR 1984
52.222-29	NOTIFICATION OF VISA DENIAL	APR 1984
52.222-36	AFFIRMATIVE ACTION FOR HANDICAPPED WORKERS	APR 1984
52.222-37	EMPLOYMENT REPORTS ON SPECIAL DISABLED VETERANS AND VETERANS OF THE VIETNAM ERA	JAN 1988
52.223-2	CLEAN AIR AND WATER	APR 1984
52.223-6	DRUG-FREE WORKPLACE	JUL 1990
52.225-11	RESTRICTIONS ON CERTAIN FOREIGN PURCHASES	MAY 1992
52.226-1	UTILIZATION OF INDIAN-OWNED ORGANIZATIONS AND INDIAN OWNED ECONOMIC ENTERPRISES	AUG 1991
52.227-1	AUTHORIZATION AND CONSENT	JUL 1995
52.227-2	NOTICE AND ASSISTANCE REGARDING PATENT AND COPYRIGHT INFRINGEMENT	APR 1984
52.227-3	PATENT INDEMNITY	APR 1984
52.227-14	RIGHTS IN DATA - GENERAL	JUN 1987
52.228-3	WORKERS' COMPENSATION INSURANCE (Defense Base Act)	APR 1984

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52.228-4	WORKERS' COMPENSATION AND WAR-HAZARD INSURANCE OVERSEAS	APR 1984
52.228-7*	INSURANCE - LIABILITY TO THIRD PERSONS	MAR 1996
52.230-02**	COST ACCOUNTING STANDARDS	AUG 1992
52.230-03***	DISCLOSURE AND CONSISTENCY OF COST ACCOUNTING PRACTICES	NOV 1993
52.230-4	CONSISTENCY IN COST ACCOUNTING PRACTICES	AUG 1992
52.230-05*** **	ADMINISTRATION OF COST ACCOUNTING STANDARDS	FEB 1995
52.232-17	INTEREST	JAN 1991
52.232-20	LIMITATION OF COST	APR 1984
52.232-22	LIMITATION OF FUNDS	APR 1984
52.232-23	ASSIGNMENT OF CLAIMS	JAN 1986
52.232-25	PROMPT PAYMENT	MAR 1994
52.232-28	ELECTRONIC FUNDS TRANSFER PAYMENT METHODS	APR 1989
52.233-1	DISPUTES	OCT 1995
52.233-3	PROTEST AFTER AWARD Alternate I (JUN 1985)	OCT 1995
52.242-1	NOTICE OF INTENT TO DISALLOW COST	APR 1984
52.242-3	PENALTIES FOR UNALLOWABLE COSTS	OCT 1995
52.242-13	BANKRUPTCY	JUL 1995
52.243-2	CHANGES - COST-REIMBURSEMENT Alternate I (APR 1984)	AUG 1987
52.244-2	SUBCONTRACTS (COST-REIMBURSEMENT AND LETTER CONTRACTS) Alternate I (JUL 1995)	MAR 1996
52.244-5	COMPETITION IN SUBCONTRACTING	JAN 1996
52.246-25	LIMITATION OF LIABILITY - SERVICES	APR 1984
52.247-63	PREFERENCE FOR U.S. FLAG AIR CARRIERS	APR 1984
52.248-1	VALUE ENGINEERING	MAR 1989
52.249-6	TERMINATION (COST REIMBURSEMENT)	MAY 1986
52.249-14	EXCUSABLE DELAYS	APR 1984
52.251-1	GOVERNMENT SUPPLY SOURCE	APR 1984
52.251-2	INTERAGENCY FLEET MANAGEMENT SYSTEM (IFMS) VEHICLES AND RELATED SERVICES	JAN 1991
52.253-1	COMPUTER GENERATED FORMS	JAN 1991

NOTES: This clause without its alternates applies if the Contractor is not immune from tort liability. Alternate I of this clause applies if the contractor is partially immune from tort liability. Alternate II of this clause applies if the Contractor is totally immune from tort liability.

SECTION I

- ** The Clause entitled "Cost Accounting Standards" (FAR 52.230-02) shall apply if the contractor is not exempt from Cost Accounting Standards (CAS) (See Section K.16 of the solicitation).
- *** The Clause entitled "Disclosure and Consistency of Cost Accounting Practices" (FAR 52.230-03) shall apply if the Offeror is not exempt from CAS but is eligible for modified CAS coverage (see Section K.16 of the Solicitation).
- ***** The Clause entitle "Administration of Cost Accounting Standards" (FAR 52.230-5) shall apply if the Contractor is not exempt from Cost Accounting Standards (CAS) (see Section K.16 of the solicitation).

SECTION I

I. AID ACQUISITION REGULATION (48 CFR CHAPTER &) CLAUSES

NUMBER	TITLE	DATE
752.202-1	AID DEFINITIONS CLAUSE-- SUPPLEMENT FOR AID CONTRACTS INVOLVING PERFORMANCE OVERSEAS Alternate 72	DEC 1986
752.203-1	OFFICIALS NOT TO BENEFIT	APR 1984
752.204-2	SECURITY REQUIREMENTS	
752.209-71	ORGANIZATIONAL CONFLICTS OF INTEREST DISCOVERED AFTER AWARD	JUN 1993
752.219-8	UTILIZATION OF SMALL BUSINESS CONCERNS AND SMALL DISADVANTAGED BUSINESS CONCERNS	
752.228-3	WORKER'S COMPENSATION INSURANCE (DEFENSE BASE ACT)	
752.228-7	INSURANCE--LIABILITY TO THIRD PERSONS	
752.228-70	MEDICAL EVACUATION (MEDEVAC) SERVICES	
752.232-70	LETTER OF CREDIT ADVANCE PAYMENT	OCT 1989
752.245-70	GOVERNMENT PROPERTY--AID REPORTING REQUIREMENTS	
752.245.71	TITLE TO AND CARE OF PROPERTY	APR 1984
752.7001	BIOGRAPHICAL DATA	DEC 1990
752.7002	TRAVEL AND TRANSPORTATION	JAN 1990
752.7003	DOCUMENTATION FOR PAYMENT	APR 1984
752.7004	SOURCE AND NATIONALITY REQUIREMENTS	APR 1989
752.7006	NOTICES	APR 1984
752.7007	PERSONNEL COMPENSATION	AUG 1984
752.7008	USE OF GOVERNMENT FACILITIES OR PERSONNEL	APR 1984
752.7010	CONVERSION OF U.S> DOLLARS TO LOCAL CURRENCY	APR 1984
752.7011	ORIENTATION AND LANGUAGE TRAINING	APR 1984
752.7013	CONTRACTOR-MISSION RELATIONSHIPS	OCT 1989
752.7014	NOTICE OF CHANGES IN TRAVEL REGULATIONS	JAN 1990
752.7015	USE OF POUCH FACILITIES	JUN 1991
752.7025	APPROVALS	APR 1984
752.7027	PERSONNEL	DEC 1990
752.7028	DIFFERENTIALS AND ALLOWANCES	DEC 1988
752.7029	POST PRIVILEGES	JUL 1993
752.7032	INTERNATIONAL TRAVEL APPROVAL AND NOTIFICATION REQUIREMENTS	JAN 1990

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752.7033	PHYSICAL FITNESS	JUL 1993
752.7034	ACKNOWLEDGEMENT AND DISCLAIMER	DEC 1991
752.7035	PUBLIC NOTICES	DEC 1991

[End of Clause]

SECTION I

I.2 PAYMENT FOR OVERTIME PREMIUMS

In accordance with FAR 52.222.2, Payment for Overtime Premiums, the use of overtime is authorized if the overtime premium cost does not exceed \$0.00.

[End of Clause]

I.3 52.222-35 AFFIRMATIVE ACTION FOR SPECIAL DISABLED AND VIETNAM ERA VETERANS (APR 1984) (DEVIATION)

(a) Definitions.

"Appropriate office of the State employment service system," as used in this clause, means the local office of the Federal-state national system of public employment offices with assigned responsibility for serving the area where the employment opening is to be filled, including the District of Columbia, Guam, the Commonwealth of Puerto Rico, and the Virgin islands.

"Positions that will be filled from within the Contractor's organization," as used in this clause, means employment openings for which no consideration will be given to persons outside the Contractor's organization (including any affiliates, subsidiaries, and the parent companies) and includes any openings that the Contractor proposes to fill from regularly established "recall" lists.

"Employment openings," used in this clause, includes full-time employment, temporary employment of over 3 days, and part-time employment, but does not include (1) executive and top management positions, (2) positions that will be filled from within the Contractor's organization or under a customary and traditional employer-union hiring arrangement, or (3) openings in an educational institution that are restricted to students of that institution.

(b) General. (1) Regarding any position for which the employee or applicant for employment is qualified, the Contractor shall not discriminate against the individual because the individual is a special disabled or Vietnam Era veteran. The Contractor agrees to take affirmative action to employ, advance in employment, and otherwise treat qualified special disabled and Vietnam Era veterans without discrimination based upon their disability or veterans' status in all employment practices such as-

SECTION I

- (i) Employment;
- (ii) Upgrading
- (iii) Demotion or transfer
- (iv) Recruitment;
- (v) Advertising;
- (vi) Layoff or termination;
- (vii) Rates of pay or other forms of compensation; and
- (VIII) Selection for training, including apprenticeship

(2) The Contractor agrees to comply with the rules, regulations, and relevant orders of the Secretary of Labor (Secretary) issued under the Vietnam Era Veterans' Readjustment Assistance Act of 1972 (the Act), as amended.

(c) Listing openings.

(1) The Contractor agrees to list all employment openings existing at contract award or occurring during contract performance, at an appropriate office of the State employment service system in the locality where the opening occurs. These openings include those occurring at any Contractor facility, including one not connected with performing this contract. An independent corporate affiliate is exempt from this requirement.

(2) State and local government agencies holding Federal contracts of \$10,000 or more shall also list all their openings with the appropriate office of the State employment service.

(3) The listing of employment openings with the State employment service system is

SECTION I

required at least concurrently with using any other recruitment source or effort and involves the obligations of placing a bona fide job order, including accepting referrals of veterans and nonveterans. This listing does not require hiring any particular group of job applicants and is not intended to relieve the Contractor from any requirements of Executive orders or regulations concerning nondiscrimination in employment.

(4) Whenever the Contractor becomes contractually bound to the listing terms of this clause, it shall advise the State employment service system, in each State where it has establishments, of the name and location of each hiring location in the State. As long as the Contractor is contractually bound to these terms and has so advised the State system, it need not advise the State system of subsequent contracts. The Contractor may advise the State system when it is no longer bound by this contract clause.

(5) Under the most compelling circumstances, an employment opening may not be suitable for listing, including situations when (i) the Government's needs cannot reasonably be supplied, (ii) listing would be contrary to national security, or (iii) the requirement of listing would not be in the Government's interest.

(d) Applicability

(1) This clause does not apply to the listing of employment openings which occur and are filled outside the 50 States, the District of Columbia, the Commonwealth of Puerto Rico, Guam, and the Virgin Islands.

(2) The terms of paragraph (c) above of this clause do not apply to openings that the Contractor proposes to fill from within its own organization or under a customary and traditional employer-union hiring arrangement. This exclusion does not apply to a particular opening once an employer decides to consider applicants outside of its own organization or employer-union arrangement for that opening.

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(e) Posting.

(1) The Contractor agrees to post employment Notices stating (i) the Contractor's obligation under the law to take affirmative action to employ and advance in employment qualified special disabled veterans and veterans of the Vietnam era, and (ii) the rights of applicants and employees.

(2) These notices shall be posted in conspicuous places that are available to employees and applicants for employment. They shall be in a form prescribed by the Director, Office of Federal Contract Compliance Programs, Department of Labor (Director), and provided by or through the Contracting Officer.

(3) The Contractor shall notify each labor union or representative of workers with which it has a collective bargaining agreement or other contract understanding, that the Contractor is bound by the terms of the Act, and is committed to take affirmative action to employ, and advance in employment, qualified special disabled and Vietnam Era veterans.

(f) Noncompliance. If the Contractor does not comply with the requirements of this clause, appropriate actions may be taken under the rules, regulations, and relevant orders of the Secretary issued pursuant to the Act.

(g) Subcontracts. The Contractor shall include the terms of this clause in every subcontract or purchase order of \$10,000 or more unless exempted by rules, regulations, or orders of the Secretary. The Contractor shall act as specified by the Director to enforce the terms, including action for noncompliance.

[End of Clause]

I.4 52.227-23 RIGHTS TO PROPOSAL DATA (TECHNICAL) (JUN 1987)

Except for data contained on pages (None), it is agreed that as a condition of award of this contract, and notwithstanding the

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conditions of any notice appearing thereon, the Government shall have unlimited rights (as defined in the "Rights in Data--General" Clause contained in this contract) in and to the technical data contained in the proposal dated 8/29/96, upon which this contract is based.

[End of Clause]

I.5 52.252-4 ALTERATIONS IN CONTRACT (APR 1984)

Portions of this contract are altered as follows:

(a) AIDAR 752-7007, Personnel Compensation (AUG 1984), is amended to delete reference to the "Foreign Service Officer Class FS-1" and insert "Foreign Service Officer Class ES-6."

[End of Clause]

I.6 COMMUNICATIONS PRODUCTS (OCT 1994)

(a) Definition - Communications products are any printed materials (other than non-color photocopy material), photographic services or video production services.

(b) Standards - USAID has established standards for communications products. These standards must be followed unless otherwise specifically provided in the contract or approved in writing by the contracting officer. A copy of the standards for USAID financed publications and video productions is attached.

(c) Communications products which meet any of the following criteria are not eligible for USAID financing under this agreement unless specifically authorized in the contract or in writing by the contracting officer:

(1) All communications materials funded by operating expense account funds;

(2) Any communication products costing over \$25,000, including the costs of both preparation and execution. For example, in the case of a publication, the costs will include research, writing and other editorial services (including any associated overhead), design, layout and production costs.

SECTION I

(3) Any communication products that will be sent directly to, or likely to be seen by, a Member of Congress or Congressional staffer; and

(4) Any publication that will have more than 50 percent of its copies distributed in the United States (excluding copies provided to CDIE and other USAID/W offices for internal use.

(d) The initial proposal must provide a separate estimate of the cost of every communications product as defined in paragraph (a) above [not just those which meet the criteria in paragraph (c)] which is anticipated under the contract. Each estimate must include all of the costs associated with preparation and execution of the product. Any subsequent request for approval of a covered communication product must provide the same type of cost information.

[End of Clause]

[END OF SECTION I]

PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS

SECTION J - LIST OF ATTACHMENTS

ATTACHMENT	TITLE	NO OF PAGES
1	STATEMENT OF WORK	86

[END OF SECTION J]

SECTION C
DEVELOPMENT EXPERIENCE CLEARINGHOUSE

BACKGROUND

OVERVIEW
OF
DEVELOPMENT EXPERIENCE INFORMATION PROGRAM

It is the mission of the U.S. Agency for International Development's (USAID) Center for Development Information and Evaluation, Development Experience Information Division (CDIE/DI) to acquire, preserve and promote knowledge of the Agency's performance and experiences in the planning, implementation, and evaluation of development programs and activities around the world, to provide research support to the development community, to promote the use of development information resources in lesser developed countries (LDCs) through its program responsibilities, and to strengthen USAID's programs through the use and analysis of internal and external information and data on development experience and social and economic conditions in developing countries.

The development community, which CDIE/DI's programs are designed to reach, include USAID's field missions and their LDC counterparts; USAID/Washington decision-makers, technical specialists, researchers, development activity designers, evaluators, and implementors; USAID Contractors and grantees; USAID-funded private and voluntary organizations (PVOs); institutions and individuals in developing countries; international and national organizations and institutions active in development and development research; firms and businesses interested in private sector opportunities in developing countries; and the general public with interests in development.

Since 1982, this mission has been pursued through three contract mechanisms managed by the Development Experience Information Division:

*** Research and Reference Service (R&RS)**

A contract which provides on-demand and proactive research, reference and analysis services to access and disseminate USAID-generated, USAID-funded and selected non-USAID information to the development community. This audience is serviced through a central research and reference staff, the USAID Development Information Center (DIC), on-site USAID Bureau liaison research analysts, specialized information centers and through technical assistance activities.

* **Economic and Social Data Service (ESDS)**

A contract which provides a mechanism for selecting, acquiring, analyzing, providing access to and disseminating economic and social statistical data for USAID-assisted countries around the world. The majority of the data which is provided through this service comes from other non-USAID sources, such as the World Bank, United Nations specialized agencies, U.S. Government agencies and other international development organizations.

* **Development Experience Clearinghouse (DEC)**
(THE SUBJECT CONTRACT, formerly known as the Development
Information Services Clearinghouse [DISC])

This contract provides access to a large body of worldwide, USAID-produced and USAID-funded, development literature and experiential information, as well as on-demand delivery, for these documents and reports through the Development Experience System (DEXS, formerly known as the Development Information System [DIS]), USAID's institutional memory system.

**INTER-RELATIONSHIP AND SUPPORTING ROLES OF CDIE/DI CONTRACTS
AND OTHER AGENCY OFFICES**

These three contracts closely interact with and complement each other in pursuing CDIE/DI's mission statement.

DEC Contract Support to ESDS: The DEC contract provides responses to on-demand orders and information dissemination services are provided for ESDS-produced publications. It also provides CD-ROM production and/or home page development support for disseminating ESDS data files and information to Agency audiences. Finally, the DEC provides the following logistical support to the ESDS contract: office space; furniture; telephone equipment and support (including voice and data lines); local area network server, connectivity, administrative support and services (including email and Internet connectivity); and reproduction equipment and services.

ESDS Contract Support to DEC: ESDS provides the DEC contractor with statistical and economic data and information required for the future production of a CDIE/DI CD-ROM disk and/or home page products to be made accessible/disseminated to USAID/Washington and USAID Mission staff.

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DEC Contract Support to R&RS: The R&RS contract relies on the DEC contract for access to and delivery of the USAID-funded and -produced development experience information and reports. The DEC updates and maintains the Development Experience System (DEXS) so that the R&RS staff can research, retrieve, analyze and disseminate USAID development experience to the development community which they serve. The DEC also provides training support for accessing the DEXS, produces an annual CD-ROM product, CD-DEXS, and designs and maintains the CDIE OnLine home page, of which both contain the DEXS databases and full-text of selected USAID publications and reports in electronic form. The CD-ROM product (and in the future the CDIE OnLine home page product) is made available to the USAID Development Information Center (DIC), along with microfiche or electronic copies of all USAID reports processed by the DEC, for public access and retrieval of USAID development experience by DIC patrons. The DEC also provides mailing list, printing and dissemination services for R&RS contract publications.

R&RS Contract Support to DEC: The R&RS contract is responsible for identifying appropriate USAID development experience documents, reports, studies and publications for acquisition and processing by the DEC contractor into the DEXS. R&RS shall refer all requests for specific USAID documents and DEC information publications, e.g. CD-DEXS, to the DEC document distribution unit.

Information Resource Management (M/IRM) Support: The IRM office provides computer operator and technical support staff, computer and communications hardware and software necessary to operate and maintain the computer system for the Development Experience System (DEXS) databases, electronic, full-text and scanned-image documents and reports and the CDIE OnLine home page. IRM shall provide the DEC contractor with on-line access to these computer systems to permit the contractor to administer, update and maintain all records, files and documentation associated with the DEXS databases, full-text and image documents and reports, and CDIE home page screens.

Relationship of USAID Records Management Unit to CDIE/DI Program: Since 1983, CDIE and the Agency Records Management unit have conducted a joint contractual activity to process Agency institutional memory and official project records into systems which utilize the same hardware/software technologies and information storage standards and to eliminate duplication of costs associated with processing the same Agency materials for these separate programs. Historically, approximately 20% of all materials selected for inclusion in the DEXS institutional memory system originate, and are accessed from, the holdings of the records management database system. One goal of these two programs is to make the future acquisition, selection and processing of development experience materials for each of these applications electronic, seamless, and as cost-effective as possible.

OVERVIEW OF AGENCY RECORDS MANAGEMENT PROGRAM

The Agency Records Management (RM) program is managed by the Information Support Services Division, Office of Administrative Services (M/AS/ISS). It is designed to promote the use of efficient and economical practices and effective control over the creation, maintenance, disposition, and preservation of all electronic and paper records, electronic medium, office records maintenance and files procedures. The RM program provides an organized system for maintaining Agency records, facilitating the selection and retention of records for archival value, and disposing non-current, non-permanent records. The purpose of the Agency's RM program is to bring together in one source all records management policies and procedures required to (1) inform Agency personnel of their records management responsibilities and (2) to provide guidance to records personnel, secretaries and file custodians, and Agency staff on the proper maintenance and disposition of official files.

HISTORY OF AGENCY RECORDS MANAGEMENT PROGRAM

The USAID records management program microfilmed official project file records from 1983 to 1993. In 1993, the Agency decided to scan new project file records and disseminate the document images using CD-ROM technology to improve access to this records collection and to further reduce the storage and filing costs associated with microfiche files and reader/printer equipment for each Agency Bureau. Today, a CD-ROM system is now in place for each bureau/office's use that captures all official project files in USAID/Washington as well as Mission materials received through Washington Bureau offices.

The USAID Project Document Database is a database containing information on microfilmed and imaged project documents. This database is used for indexing, searching and identifying specified microfiched (historical) or scanned documents. The database is also disseminated on the CD-ROM. A portion of these project files are considered to be permanent records by the Agency and are subsequently transferred to NARA at a later date according to predefined retention and archival schedules for permanent Agency records.

Also, USAID converted the external regulations from paper media to CD-ROM in 1993. Each quarter, the external regulations are updated and distributed to an approved mailing list throughout the Agency.

The Records Management Student Workbook was developed in 1995 to conduct workshops which will provide direction to Agency staff on Agency filing systems and managing paper-based record systems in accordance with USAID and external USG regulations.

INTER-RELATIONSHIP AND SUPPORTING ROLES OF RM CONTRACTS AND OTHER AGENCY OFFICES

*** Directives Contract**

This contract provides technical support to USAID in processing new and revised electronic directives. These directives are entered into an automated directives system which produce directive texts, external directives/publications, and USAID Notices. A copy of these directives shall be provided to the DEC contractor to be published in a CD-DR, Directives CD-ROM, and disseminated to USAID Mission and USAID Washington offices and external subscribers twice a year.

*** Information Resource Management (M/IRM)**

The IRM office provides computer operator and technical support staff, computer and communications hardware and software necessary to operate and maintain the computer system for the RM Project Document Database, its associated full-text and image-scanned documents, and the M/AS/ISS Corporate Web home page. This database contains references to all historical microfiche and scanned document images. Eventually it will also provide storage and access to all electronic images of scanned project file records. IRM shall provide the DEC contractor with on-line access to these computer systems to permit the contractor to administer, update and maintain all records, files and documentation associated with the database.

* **Development Experience Clearinghouse (DEC)**
(THE SUBJECT CONTRACT, formerly known as the Development
Information Services Clearinghouse [DISC])

This contract shall provide the necessary technical processing services to acquire electronic records and scan paper copy records which will be indexed and stored in a Project Document Database. The database, electronic documents and document images shall be made accessible through a corporate (intranet) home page and CD-ROM products. This contract shall receive electronic directives from the M/AS/ISS and produce semi-annual DR-CD (CD-ROM) products. Finally, this contract will provide all training to users of the following records management products: Project Document Database, DR-CD, records management guidelines and procedures for document management, and Corporate Web products.

In addition, other Agency contractors may be involved in the CDIE/DI and RM programs. Their role shall be defined and guided through technical direction provided by either CDIE/DI or M/AS/ISS, as appropriate.

SCOPE OF WORK

DEVELOPMENT EXPERIENCE CLEARINGHOUSE

C.1. DEVELOPMENT EXPERIENCE SERVICES

The Contractor shall operate and manage the USAID Development Experience Clearinghouse (DEC) which will perform a variety of development experience services from a facility in the Washington, D.C. area. These services shall be provided to the USAID development community, broadly defined above, and as directed by the Center for Development Information and Evaluation, Development Experience Information Division (CDIE/DI) management. The Clearinghouse shall provide access to a large body of worldwide, USAID-produced and USAID-funded, development literature and experiential information. The contractor shall provide a variety of professional and technical services to obtain and select key Agency development experience materials, extract or format documented lessons learned and other experiential, technical and performance-based information, and create value-added, electronic and paper-based, information products which convey USAID's development knowledge to USAID staff, their development partners, and the U.S. public.

The contractor shall provide professional staff with international development knowledge in USAID's strategic program areas of democracy and governance, environment, population and health, economic growth, humanitarian assistance and human capacity development. This staff shall review USAID development materials to identify, select, summarize, catalog, index, and communicate experiential information through a series of printed and electronic information and database products which are tailored for use by CDIE's priority audiences, i.e. USAID staff and their development partners.

The selected Agency materials shall be managed and maintained in a series of databases which comprise the Development Experience System (DEXS), the Agency's institutional memory, and the M/AS/ISS Project Documents Database. The contractor shall acquire, store, and manage selected documents and reports in electronic form, including scanning of paper copy reports in electronic image and text formats. (Some retrospective conversion of microfiche and paper copy materials to electronic format shall also be required.) The contractor shall provide warehouse facilities or services for storing original paper copy or additional stock of published source materials. The contractor shall manage a 5,000 term development assistance vocabulary and use it to organize and index DEXS and Project Documents Database information and communications products.

The contractor shall provide on-demand, electronic and paper copy, reproduction and document delivery services of acquired USAID development experience and official development assistance activity materials. Documents will be provided to USAID staff gratis and to all other customers on a cost reimbursement basis, or where the cost of retrieval is born directly by the non-USAID client. A variety of mechanisms, including internal Agency corporate intranet, as well as, external Internet World Wide Web and Gopher electronic publishing methods will be used to respond to requests and disseminate information. The contractor shall use CD-ROM publishing as a communications and delivery approach for transferring (1) USAID development experience and (2) policy and implementation guidelines in the Agency's Automated Directives System, to remote USAID Mission and development partner operations which cannot be serviced through on-line access methods. The contractor shall employ electronic and traditional paper-based methods for electronic distribution and bulk mailing of Agency materials.

The contractor shall also provide training and technical assistance to USAID Washington staff, USAID Mission staff and their development partners in records management, information clearinghouse/center, and development communications programs, in addition to, development experience management methods to organize, synthesize, access and disseminate development experience and technical information through various communications media.

C.1.a. ACQUISITION OF USAID DEVELOPMENT EXPERIENCE MATERIALS

C.1.a.1. ACQUIRE USAID MATERIALS

The contractor shall receive electronic and paper copy development experience materials on a daily basis which are (1) identified by the Research and Reference Service contractor, and (2) also received from the records management system and other sources specified by CDIE/DI, for inclusion in the Development Experience System (DEXS). This includes current USAID program, policy and development activity documents; USAID publications and contractor reports; current USAID-funded or -supported technical reports and research studies; retrospective USAID documents (dated more than five years ago), and a small number of USAID classified documents, audiovisuals, and serial publications.

These development experience materials generally fall into one of the following nine categories:

- (1) Policy and strategy development documents and directives.

Policy analyses, strategic plans, concept and issues papers, and resulting final guidance or directives prepared for USAID programs, in whatever form they are disseminated (guidance cable, published policy paper).

- (2) Program and development activity studies, surveys, and analyses.

Examples include development activity-funded research reports, feasibility or sector studies, analytic and technical papers, and other key works that underlie the design of a USAID development assistance program, project, or activity.

- (3) Program descriptions, justifications, and reviews.

These are reports which define, describe, or analyze current or prior USAID programs at country, sector, or issue levels.

- (4) Development activity design and authorization documents.

These are reports which define, describe, authorize, and document a commitment to a USAID development assistance activity. Only key works in final approved form, whether funded from Economic Support Funds (ESF), Development Assistance (DA), the Development Fund for Africa (DFA), Food for Peace, or other USAID economic and development assistance accounts are to be received and processed.

- (5) Program and development activity evaluation, performance review, performance measurement and indicator reports.

These are USAID reports which document significant evaluation findings, "lessons learned", development results, performance measures, evaluative information and observation.

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- (6) USAID-supported research and technical reports and publications.

These are reports which are produced under a USAID program, development activity, contract, grant, or cooperative agreement for supporting USAID activities.

- (7) Organizational, functional, or sectoral management studies and reviews.

These are studies of USAID institutional experience in managing, assessing or reviewing U.S. foreign assistance programs, operations, organization or management initiatives. Also included are Agency-wide management reviews, strategic plans, proposals, and reorganization information, e.g., Reorganization Updates, [staffing patterns, organizational charts], etc.

- (8) Non-print information products.

These are graphic, artifact, media, and/or electronic information products, tools, and training materials, etc., produced with Agency program funds in the furtherance of a USAID development assistance activity.

- (9) Contractor and Grantee Annual Reports, Final Reports, and Other Contract Deliverable Information Products.

These include categories of print and non-print information products of the above eight "Development Experience Document" categories funded or produced by USAID. Also included are quarterly and semi-annual progress reports, trip reports, interim reports, and status reports.

C.1.a.2. ACQUIRE NON-USAID MATERIALS

The contractor shall also acquire a small number of selected non-USAID development-related materials in priority USAID program areas each year, e.g. GAO reports, CD-ROM products and on-line database services in international development-related topics, and reports and studies from other development organizations to support the activities of the clearinghouse.

C.1.a.3. ACQUISITION MECHANISMS

The contractor shall develop and use pro-active mechanisms for the acquisition of materials meeting the selection criteria provided by PPC/CDIE/DI. The contractor shall establish and maintain a network of Agency acquisitions liaisons for each Agency Bureau, independent Office, and field Mission. The contractor shall also establish and maintain an active network of acquisition liaisons with a least 150 of USAID's principal contractors (PVOs, universities and businesses).

The following acquisition sources shall be used by the contractor:

- (1) The M/AS/ISS Project Documents Database;
- (2) USAID/W offices responsible for the production and/or distribution of development experience and technical documentation;
- (3) USAID Overseas missions. Missions are to be contacted only with CDIE/DI concurrence. Missions are to be contacted only after USAID/Washington sources have been contacted and have proved to be unable to supply the needed materials;
- (4) Contractors and organizations receiving funding from USAID;
- (5) Agency contract mechanisms and procedures established by CDIE/DI requiring submission of publications and reports produced by contractors;
- (6) Regional and Central Bureau activity tracking and reporting systems;
- (7) CDIE/DI-provided information on Agency contracts, programs and activities from the Agency's New Management Systems;
- (8) Publications lists and bibliographies produced by USAID contractors and organizations receiving funding from the Agency;
- (9) USAID-funded newsletters and periodicals;
- (10) USAID printing and distribution shop;

- (11) USAID Bureau and Mission strategic plans, results reporting and resource request reports, annual budget submissions, action plans and congressional presentations; and,
- (12) USAID-funded clearinghouses.

CDIE/DI shall provide selection and prioritization guidelines for the contractor. The contractor's employees may be required to exercise professional judgement in determining which specific items meet these guidelines.

Under the direction of CDIE/DI, the contractor shall develop and produce outreach products designed to describe CDIE/DI acquisitions needs to sources of Agency-sponsored materials.

When the copy of a report, acquired by the contractor or in the DEXS, is of poor legibility and cannot be adequately scanned, the contractor shall attempt to acquire a more legible copy of the report from the report's generating source.

The contractor shall develop methods for statistically analyzing acquisitions from Bureau and Mission sources, e.g. percentages of total receipts, timeliness of receipts, numbers of documents by document type, country and/or region and major subject, etc. The contractor shall prepare quarterly performance reports describing the progress and issues associated with the CDIE/DI acquisitions program.

C.1.b. PROCESSING DEVELOPMENT EXPERIENCE MATERIALS

The contractor shall provide professional staff with international development knowledge in USAID's strategic program areas (democracy and governance, environment, population and health, economic growth, humanitarian assistance and human capacity development) who can identify, select, review, analyze, synthesize and organize pertinent development strategies, findings, results, facts, performances and lessons learned which shall effectively communicate the Agency's experience to the development community. This staff shall process current and retrospective, hard-copy and electronic, USAID reports acquired by the DEC acquisitions staff and the records management system each year. The existing 90,000+ USAID development experience documents, 10,000+ USAID development activities, 40,000+ lower-priority inventory of USAID documents, and 9,000+ institutional authority entries presently accessible through the DEXS (and additional accumulated holdings during the course of this contract) shall also be maintained and updated, as necessary, by the contractor.

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C.1.b.1. DOCUMENT SELECTION

The newly acquired documents shall be analyzed by the contract development information specialist staff against pre-defined criteria provided by CDIE/DI for possible accessioning into the Development Experience System (DEXS). Each item will be reviewed and selected based on its potential for significant contribution towards the improvement of the Agency's development experience knowledgebase in each USAID strategic program area. Non-critical items will either be disposed or inventoried for possible, later accessioning into the DEXS. All items accessioned or inventoried will be maintained by the contractor and made accessible through the on-line DEXS or on-demand, respectively.

C.1.b.2. DOCUMENT REVIEW, ANALYSIS & DESCRIPTIVE CATALOGING

Once an item has been accessioned, the contractor shall review and analyze the electronic or paper copy source materials to prepare standardized, descriptive, bibliographic citations for each USAID development experience document or report to be entered into the appropriate DEXS database. The contractor shall use the analytical and cataloging approach presented in their proposal, which has been subsequently reviewed and approved by CDIE/DI management. It will emphasize the value-added processes which improve the accessibility and content of development experience provided through the new Development Experience System while maximizing the preservation of USAID's prior investments in the construction and maintenance of the extant DEXS knowledgebase.

A process that is comparable to descriptive cataloging shall also be performed for research activities, evaluation activities, audio-visual materials, program, strategic objective, and development activity information processed into the appropriate DEXS databases. DEXS authority files and processing procedures, proposed by the contractor and approved by CDIE/DI, shall be used to standardize the document review, analysis and descriptive cataloging function.

The DEC acquisition staff shall obtain various development experience materials that shall enable the contractor to identify new USAID strategic objectives, programs and development activities each year. The Clearinghouse development information specialist shall analyze, select and extract descriptive information for each item according to their approved processing guidelines and rewrite, reformat, organize and enter this information into the appropriate DEXS database structures.

The DEC acquisition staff shall also obtain various historical development assistance documents enabling the contractor to identify additional retrospective (prior year) development activities each year to be entered into the appropriate DEXS database.

The Clearinghouse's processing approach shall provide the necessary data to maximize the end user's ability to easily cross-reference, hyperlink or associate specific development experience materials and documents with related USAID strategic objectives, programs and development activities, or vice versa.

The Clearinghouse shall inventory and provide brief descriptive citations for lower priority, retrospective (prior year) USAID development experience documents and reports into the appropriate DEXS database which do not meet the CDIE/DI selection and priority requirements to receive full DEXS processing.

The Clearinghouse shall inventory and perform descriptive cataloging for retrospective and new USAID audio-visual materials in the appropriate DEXS audiovisual database.

The Clearinghouse shall provide descriptive cataloging references for classified documents received by CDIE/DI into the Classified Catalog database maintained on the CDIE/DI LAN server. The cataloger providing technical services for processing documents into the Classified Catalog database shall require a secret-level security clearance.

C.1.b.3 SUMMARIZING DEVELOPMENT EXPERIENCE REPORTS

The contract development information specialist shall synopsise or abstract, as appropriate, selected priority development experience documents and reports which contain significant development, research, or evaluation results, findings, lessons learned, new development and evaluation methods, etc. These summaries shall be written in an indicative and informative style. Each summary should be about 200 words for research and development reports, evaluation studies, research activities, and other publications. In addition, summaries of varying length, not to exceed 500 words, shall be extracted from existing documents or prepared for strategic and intermediate goals and objectives, development programs and activities when such information has been located in a relevant development experience document or publication.

The contractor shall limit the amount of original summary preparation in favor of maximizing the use of more cost-effective author-supplied summaries for development experience reports and activities.

C.1.b.4. INDEXING DEVELOPMENT EXPERIENCE MATERIALS

The contractor shall assign an average of 8 to 10 geographic and subject descriptors to index each development experience report, development program or activity or audiovisual in the appropriate DEXS database. The Thesaurus of USAID descriptors, which the contractor's lexicographer is required to maintain, shall be used as the source of all indexing terms assigned to these development materials. The contractor shall also be required to re-index selected development experience activity and document records each year.

C.1.b.5. SCANNING DEVELOPMENT EXPERIENCE REPORTS

For those materials received in paper form only, the contractor shall first follow-up (for priority development experience materials only) with the DEC Acquisitions specialist, CDIE/DI direct-hire staff and, as appropriate, the originating source of the document(s), to obtain an electronic version to accession into the DEXS, in lieu of the paper copy. Each year, the contractor shall increase and maximize the number of documents which are received in electronic form.

The contractor shall scan all development experience documents and reports which can only be obtained in paper copy form. All documents which are scanned shall be image scanned and stored electronically in a CCITT Group IV TIFF or Adobe Acrobat PDF format file (or alternative Agency standard format approved by M/IRM and CDIE/DI). A minimum of 300 DPI resolution scanning shall be performed. In addition, selected experiential reports which are determined to contain significant development results and findings by the development information specialist staff shall be OCR scanned, with the resulting text stored as ASCII files. All scanned image and text files shall be archived by the contractor for backup and on-demand retrieval, print and/or dissemination services. Both the image and OCR files representing the report shall be made accessible through the appropriate DEXS databases, CDIE OnLine home page, USAID Internet Gopher and World Wide Web home page access services.

The contractor shall store all original source paper copy documents (and historical, master and silver duplicate microfiche) for the period of time between the scanning (and previous contractor filming) of received documents and the retirement or destruction of these documents as determined by CDIE/DI.

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C.1.c. USAID THESAURUS OF DEVELOPMENT DESCRIPTORS

The contractor shall maintain the existing USAID Thesaurus of economic and social development descriptors which shall be the subject- and geographic-term authority list for (a) indexing of development programs and activities, development experience reports, research activities, and audiovisuals; (b) creating main entries in periodic and cumulative indexes on electronic and paper-based DEXS publications; (c) analyzing requests for information and conducting subject searches of the DEXS databases and (d) performing selected dissemination of information of USAID development knowledge.

Entries in the Thesaurus of USAID descriptors shall be structured to reflect appropriate relationships and cross-references among terms including Related terms (RT), Broader terms (BT), and Narrower terms (NT). In addition, scope notes and definitions shall be used, as shall cross-references to non-preferred terms and to discontinued terms previously used in indexing. The contractor shall also define and name descriptor groupings (e.g. USAID_AFRICA to represent all USAID-assisted countries in Africa) that are convenient to indexers, R&RS research and library staff and end-user searchers and compatible with the subject categories used in database publications.

The contractor shall maintain the USAID Thesaurus as an online DEXS database. The on-line version of the Thesaurus shall include a concordance or other technique enabling a searcher to use new descriptors to retrieve records that have been indexed previously, with old terms.

The contractor shall be required to prepare printed copies of the USAID Thesaurus for distribution to users of the DEXS and the thesaurus product. For the printed versions, the contractor shall provide (a) an end-user introduction with indexing and retrieval guidelines, (b) a hierarchical descriptor group display, (c) an alphabetical display of main terms, (d) a permuted term listing, and (e) a postings list.

The contractor shall desktop publish, print and distribute a revised version of the USAID Thesaurus at least once every two years.

The contract lexicographer shall maintain the on-line Thesaurus throughout the contract, recommending to USAID the addition and deletion of terms, appropriate term relationships and additional or revised scope notes. The contractor shall design and implement a system and procedure for proposed thesaurus term review and approval and thesaurus maintenance. This process shall be documented and maintained. All thesaurus concept term additions or modifications shall be presented for review and approval by CDIE/DI management prior to amending or producing the on-line or printed USAID Thesaurus products.

The contractor shall also maintain non-subject authority files for institutional names, projects, contracts, document types, sectors, etc. as required for development experience material processing.

C.1.d. ELECTRONIC DISSEMINATION OF DEVELOPMENT EXPERIENCE

The contractor shall produce a number of DEXS database-generated and independently-produced, electronic and desktop-published products including: special bibliographies, acquisition lists, HTML documents and home pages, briefing portfolios, brochures, presentation graphics, annual reports, training materials (users manuals, thesauri, operations manuals, quick-help guides, reference manuals), and other special publications that can be produced as current awareness materials of PPC/CDIE products and services. CDIE/DI will define the topics and scope of these products and services. Some of these products shall be used by the contractor to support the outreach, dissemination and training programs described in later sections.

The contractor development information specialists shall organize, write, edit and present Agency development experience information consistent with the current USAID terminology, taxonomy, strategic development approach, methods of conducting Agency business and measuring Agency program results.

The contractor shall also provide desktop publishing specialists with experience in editing and formatting highly technical and lengthy publications and reports with imbedded tables, graphics, notes, etc. and who are knowledgeable on all aspects of the use of Wordperfect word processing software, Pagemaker and Ventura desktop publishing software.

The contractor shall acquire source materials from CDIE direct-hire staff and contractors, in addition to normal electronic acquisitions, and use these materials to (1) design and maintain the CDIE OnLine home page for Agency corporate web (intranet) access, (2) provide CDIE's contributions to the USAID Internet home page and (3) the Internet Gopher services. The contractor shall create and use electronic graphics, icons, charts and tables to illustrate and interpret statistical data trends, facilitate access to development experience materials, and establish cross references and hyperlinks to related CDIE, other USAID and Internet HTML pages and websites. The contractor shall reformat received electronic materials and publish them electronically through these services, in addition to, making them available through AIDNET email and Agency listserv/listproc and bulletin board services. The contractor shall provide and use various Internet-related and electronic publishing software to disseminate and facilitate access to all CDIE and DEXS institutional memory materials for the primary clearinghouse audiences. This software must comply, where applicable, with Agency-provided software supplied to this contract by the Agency Office of Information Resources Management (M/IRM).

In conducting this task, the contract development information specialist staff shall, at a minimum, perform the following information dissemination activities:

- (1) Prepare a monthly acquisitions report which highlights recent key development experience reports accessioned into the DEXS during the last month which have been received from USAID Missions, USAID Washington offices and USAID-funded contracts.
- (2) Prepare, at least annually, special Development Experience Bibliographies of pertinent Agency development experience materials published or produced by the Agency and added to the DEXS during the previous 12 month period which highlight development results, lessons learned, strategies, development experience, methodologies, development information issues, etc. which are of current interest by USAID and development counterpart staff. One bibliography should be produced for each of the USAID strategic program areas.
- (3) As required, prepare other selected, proactive, Clearinghouse development experience products.
- (4) Disseminate electronic versions of (1) through (3) using selected electronic networks outlined above. As necessary, produce sufficient paper copy versions of these products to satisfy on-demand requirements through the CDIE/DI's Development Information Center (library) and the Clearinghouse Document Distribution Unit.

The contractor shall also develop and produce an annual CD-ROM optical disk, CD-DEXS (Compact Disk - Development Experience System) which shall contain the latest version of selected DEXS databases, acquired copies of USAID Mission and contractor library catalog databases, selected full text documents of CDIE and other Agency reports and publications processed onto the DEXS and other relevant development information for local access and use by USAID Missions and developing country institutions who are not able to access to the Agency's intranet corporate web or the USAID Internet site. The contractor shall use the existing CD-ROM publisher equipment. The contractor shall use the current Romware software or a proposed, and subsequently approved equivalent or improved software program for building and accessing the CDIE/DI-specified information on CD-ROM. Proposed software shall be compatible with Banyan Vines network environment, operate on Agency standard CD-ROM servers, and run under a Windows 3.1, DOS 6.0 or future M/IRM-specified operating environment. Technical direction shall be provided by CDIE/DI to produce the annual CD-DEXS CD-ROM.

The contractor shall be responsible for all aspects of these publications and DEXS database-generated products, including the preparation of covers, artwork and front matter, composition, layout, graphics, editing, proofreading, in addition to desktop publishing, CDROM premastering, electronic and optical publishing, printing, reproduction, and distribution.

The contractor shall provide all electronically published and paper copy versions of clearinghouse information products gratis to USAID staff. The contractor shall pay for any postage costs necessary to distribute paper copy or CD-ROM publications to USAID staff. Non-USAID staff shall be required to purchase clearinghouse products on a cost recovery basis. A cost-reimbursable subscription service for CD-DEXS shall be offered by the contractor for non-USAID customers.

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C.1.e. RESPONDING TO DEVELOPMENT EXPERIENCE REQUESTS

The contractor shall receive, log, analyze, and fulfill requests for development experience documents, microfiche, and other electronic and audiovisual materials. The contractor shall fulfill requests that can be satisfied by sending paper copies of documents that have been printed and stocked; negative diazo copies of individual microfiche; 8.5" x 11" paper copies of documents created from negative fiche or scanned image files, or electronic copies of documents which have been stored as image files, ASCII text files or other software application format files such as Wordperfect documents, Lotus spreadsheets, etc. Electronic documents will be provided to the customer via the DEXS databases, CDIE OnLine home page, USAID Internet Gopher, WWW and Listserv applications, diskette, CD-DEXS, or via AIDNET email attachment. Requests that entail reference work or research will be identified by the contractor and referred to the R&RS contractor for handling.

The contractor shall establish procedures to ensure that appropriate and complete responses to requests are provided according to the following priorities:

- | | |
|--------------|--|
| Priority I | Requests from USAID missions, USAID Washington Bureaus and offices, USAID contractors (and other special requests, e.g. Congressional requests) provided through the USAID contract monitor. |
| Priority II | Requests from LDC institutions, PVOS, Peace Corps and other USAID development partners. |
| Priority III | Requests from other sources, e.g. the U.S. public, commercial firms, universities, etc. |

The contractor shall retain one copy each of all written, faxed, and emailed correspondence received from and transmitted to requestors. If a request is received as written, faxed or emailed correspondence, a copy of the original request shall be attached to a copy of the contractor's response.

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The contractor shall be responsible for receiving bulk quantities of publications and distributing these to addressees in the Recipients Database and to other addressees designated by USAID. The contractor shall maintain the Recipients Database (or equivalent distribution files) with 15,000+ records of addresses who receive bulk-distributed CDIE and other Agency publications. Records contain organizational and individual names, addresses, interest profiles, and other recipient characteristics. Profiles and characteristics are used in making dissemination decisions on an individual basis regarding degree of interest and eligibility. Recipients shall be cleared by USAID personnel. The contractor shall be responsible for validating and updating all user-related data on the Recipients database, including changes that users desire in their field of interest profiles. The contractor shall perform this validation and update the Recipients database annually.

The contractor shall confer with USAID and obtain approval before fulfilling requests for bulk quantities of documents or requests for new standing orders. The contractor shall also confer with USAID to identify institutions and recipients that are authorized free distribution, and those which are not authorized to receive documents free of charge. In all cases the contractor shall follow the latest document distribution and charging policies and other procedures found in the Clearinghouse Operations Manual.

The contractor shall establish and manage a direct cost reimbursement system for direct post-to-contractor and public-to-contractor purchase of USAID paper copy, microfiche, audiovisual, electronic media, and optical disk products and materials, where the billing and invoice processes are direct transactions between the purchaser (overseas post, public, institution) and the vendor (USAID Clearinghouse contractor). The system will be flexible enough to accommodate individual, complete set and standing orders of USAID development experience materials. The costs which are recovered from this cost reimbursement system by the contractor shall off-set the monthly costs billed to the Agency for Clearinghouse services in the contractor's invoice.

No classified document materials shall be provided or housed at the clearinghouse facility. However, the contractor shall be required to process and house procurement sensitive and other types of restricted access information as part of the USAID development experience and records management collections. To protect the access to this information and to avoid potential conflict of interest, the clearinghouse contract firm may be precluded from award of other USAID contracts (as a prime or subcontractor). This determination will be made by the cognizant contracting officer for the affected procurement.

The contractor shall keep detailed and useful records and data about requesters and order fulfillment for later use in follow-up and evaluation of the clearinghouse customer service operations.

The contractor shall provide warehouse, inventory and computer storage space to store documents and development materials in paper copy, microfiche, electronic, publication negatives and other media formats. The contractor shall also provide appropriate facilities, supplies, equipment and/or vendor services for paper, microfiche, videotape or electronic media reproduction, electronic-to-paper reproduction, microfiche-to-paper blowback, packing, addressing, and shipping documents and other development experience materials.

The contractor shall pay postage, reproduction and handling costs for all USAID Mission, USAID Washington Bureau/Office and LDC institution (microfiche, electronic and optical media only) shipments. The contractor shall charge and collect fees for reproduction, handling and postage costs associated with clearinghouse services provided to all other user groups.

The contractor shall also provide daily hand-delivery (and pick up) courier services for development experience materials for USAID users and requesters located in the main State Department building and State Department annex buildings in the Washington, D.C. area.

C.1.f. PROACTIVE OUTREACH AND COMMUNICATIONS SERVICES

The contractor shall plan, develop, implement and periodically assess an outreach and communications program to: promote Clearinghouse products, services, resources, and technical assistance support capabilities; and inform USAID and development counterpart staff on the use of Clearinghouse development experience resources which are becoming increasingly accessible through new and improved information technologies. The contractor shall periodically appraise the need to increase the potential requesters' awareness of Clearinghouse services. In performing this task, the contractor shall propose (for approval by CDIE/DI management), develop, and implement feasible methods of outreach, communication and promotion to enhance and expand CDIE/DI's development experience information program.

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In conducting this task, the contractor shall design and produce a variety of communications materials, e.g. videotapes, brochures, flyers, HTML documents and pages. The contractor shall, when appropriate, use the AIDNET (internal Agency email network), CDIE OnLine home page, USAID bulletin board and listservs, and Internet networks for (1) promoting Clearinghouse information products and services and (2) increasing awareness of Clearinghouse development experience information resources to primary user audiences.

In addition, the contractor shall be required to reproduce, print, electronically publish, maintain a mailing list and distribute R&RS contractor publications including, but not limited to, the following:

- (1) A monthly Requests and Responses newsletter which highlights a sample of information services, products and resources provided by the R&RS contract during the month to USAID Bureaus, Offices, and Missions.
- (2) A monthly New This Month bulletin, which announces newly acquired development publications and resources which are relevant to USAID's current development programs and which are available through the USAID DIC.
- (3) A series of in-depth issues briefs, research papers, concept papers, etc. on development themes, strategies, development experience, methodologies, development information issues, etc. which are of current interest by USAID and development counterpart staff.

C.1.g. TRAINING AND USER EDUCATION

The contractor shall provide professional, development specialist, training services to design and implement a multi-level user training program for the Development Experience System, CD-DEXS (CD-ROM) and CDIE OnLine (corporate web and Internet) home page products and services for three different types and levels of user groups:

- (1) Decision-makers and program managers;
- (2) Project designers, implementors and evaluators; and,
- (3) R&RS contract information specialists, librarians and research analysts.

Each of these user groups shall learn how to efficiently access development experience information from the DEXS and related Clearinghouse products and information services and products which are pertinent to their development specialization or interest.

USAID Mission and USAID/Washington personnel shall be trained on-site in Agency office or training space.

The training and user education program shall include, but not be limited to, classroom instruction, hands-on training and workshops on the DEXS, CDIE OnLine home page and related products and services, development of user manuals and aids, instructional materials, visual aids and course outlines, evaluation of the training programs and follow-up training where necessary. It is estimated that an average of one training course and one follow-up training session per month shall be required.

The contractor shall also prepare periodic user awareness announcements of new or improved DEXS, CD-DEXS, and CDIE OnLine resources, products and services, and electronically distribute them to all principle end users.

The contractor shall attend users group meetings for the application software package used to maintain the DEXS databases at least twice a year to learn of new end-user application features and end-user training techniques.

C.1.h. KNOWLEDGEBASE MANAGEMENT AND TECHNICAL SUPPORT

The contractor shall provide database specialist, document specialist and electronic publishing personnel who are experienced in managing database, intranet and Internet resources with the hardware/software toolset provided by the Agency's Office of Information Resources Management (M/IRM). M/IRM shall provide the necessary toolset and technical staff for operating and maintaining the computer hardware and software resources which will support the DEXS knowledgebase, Agency intranet corporate web, and USAID Internet World Wide Web, Internet Gopher and listserv/listproc/email services and sites. Clearinghouse contract staff will use these toolsets to define, update, and maintain (1) the DEXS development experience databases, (2) HTML pages associated with the Agency intranet corporate web and USAID Internet home page, (3) electronic files associated with the USAID Internet Gopher site, and (4) electronic messages and documents accessed and disseminated through the AIDNET email, bulletin board and listserv/listproc systems.

The DEXS development experience databases shall be defined and updated by the contractor to manage information on development strategies, objectives, programs and activities; documents, reports and publications; official records; clearinghouse mailing lists, orders and users; audiovisuals; electronic, optical, microfiche and other media development materials; research activities and other development experience resources.

The M/IRM toolsets currently include a SUN Unix Server with Solaris operating system, Basis Plus text and document management software, and Basis Web Browser software. M/IRM shall provide the contractor with sufficient electronic storage capacity to house the DEXS development experience knowledgebase. M/IRM shall also provide the technology to make the knowledgebase and CDIE OnLine home page resources accessible through the Agency intranet corporate web and the USAID Internet home page and Internet Gopher sites. M/IRM shall maintain adequate system performance and capacity sufficient to support clearinghouse operations and resource requirements. M/IRM shall provide timely solutions which will quickly resolve system performance issues affecting the efficient operation of clearinghouse activities.

The contractor shall also provide computer specialist staff required to operate and maintain the clearinghouse local area network, workstations, printers, electronic and optical storage devices, scanning equipment, CD-ROM equipment and associated software for local clearinghouse service support system applications.

The contractor shall provide data entry and database maintenance on a current basis for the information resulting from the review, analysis, descriptive cataloging, indexing, synthesis and summarization of development experience materials, scanning, user services and other development material processing steps.

The contractor database specialists shall create database products as required, including database reports and print formats, database exchange tapes, selected dissemination of information (current awareness) reports, computer-output-microfiche (COM) products and indexes, optical disk products (CDROM), document tracking, user services, and quality control, service evaluation and management reports.

At the beginning of this contract, USAID shall provide the contractor with access to existing DEXS databases, records management databases and clearinghouse facility databases and information resources, which are to be maintained by the contractor.

The contractor shall be required to periodically receive and load data exchanged with other development information organizations such as IDRC, CIDA, the World Bank, JICA, etc.

The contractor shall also be required to periodically prepare database and or development materials required for submission to the National Technical Information Service (NTIS) database for technical reports prepared under USAID-sponsored research and development projects.

The contractor shall complete an annual hardware/software inventory of all computer, micrographics, and other information technology equipment, and software that has been purchased under the contract or received from USAID to support clearinghouse operations. The contractor shall include, as part of the inventory, recommendations for information technology improvements.

The contractor shall provide training services to database specialist staff to attend annual users group meetings for the application software package used to maintain the DEXS databases, CDIE OnLine Home Page, and other clearinghouse on-line products to learn of new database and software application features.

C.2. AGENCY RECORDS MANAGEMENT SERVICE

The contractor shall provide the following Agency records management services as part of this contract scope of work.

C.2.a. RECORDS AND IMAGE MANAGEMENT SERVICES (RIMS)

The contractor shall provide scanning services for Agency documentation and filing systems specified by the USAID Records Management Program (M/AS/ISS); manage and maintain the scanned documentation; disseminate, and electronically publish, information products using M/AS/ISS-approved information media (electronic, optical, and/or paper copy) for Agency end user requirements. The specified documentation includes all official Agency development activity and project documentation which record and report on the implementation of the Agency's program functions and requirements.

Agency bureaus and offices have a system in place to capture this official documentation. The contractor shall select appropriate official records and documents, as directed by M/AS/ISS. The contractor shall perform document formatting, preparation, and batching of M/AS/ISS-specified documentation and files prior to image scanning. The contractor shall only format those records that are to be scanned. (The contractor shall not format other Agency records for other purposes such as reorganizing filing systems for a particular Bureau or Office.) Records which are to be formatted will be located in file drawers, boxes or other physical storage areas.

The contractor shall scan all paper copy documents identified by M/AS/ISS and store the scanned images electronically in a CCITT Group IV TIFF or Adobe Acrobat PDF format file (or alternative Agency standard approved by M/IRM and M/AS/ISS). A minimum of 300 DPI resolution scanning shall be performed. In addition, selected documents determined to contain significant value by the records management specialist staff shall be OCR scanned, with the resulting text stored as ASCII files.

The contractor shall continue dissemination of scanned official project documentation using CD-ROM technology. The contractor shall prepare CD-ROMs, upon a specific or standing-order Agency request, with scanned documents belonging to the requesting USAID Bureau/Office. The contractor shall download the appropriate portion and most recent version of the Project Documents Database onto CD-ROM. Document images of associated Bureau/Office documents will be loaded onto the CD-ROM and connecting hyperlinks to these electronic document images shall be established through the CD-ROM software. Each CD-ROM produced will receive technical direction and approval from M/AS/ISS. The master copy of each CD-ROM shall be stored in industry-standard environmentally-acceptable conditions.

The contractor shall create paper copies of documents from scanned images for on-demand document request fulfillment, similar to Section C.1.e. "Responding to Development Experience Requests". The contractor shall comply with the classified and procurement sensitive document requirement as stated in Section C.1.e.

In addition to CD-ROM technology, the contractor shall provide access to the Project Documents database and electronically disseminate official documents using the Agency's intranet corporate web, USAID Internet WWW home page and Internet Gopher sites as approved by M/AS/ISS.

C.2.b. MAINTENANCE OF PROJECT DOCUMENTS DATABASES

The contractor shall operate and maintain a Project Documents database with descriptive indexing information on all microfiched and electronic image (scanned) official project documentation and files.

To update and maintain this system, the contractor shall utilize the document numbering scheme that is already defined for the purpose of document tracking and duplicate-checking as documents are processed, scanned and entered into the database. The contractor shall perform data entry of descriptive indexing information for all new project documents added to the database.

The Project Documents Database shall be used for accessing and downloading onto CD-ROM the specified document citations to be used for searching and locating specific imaged documents found on the CD-ROM. Each downloaded citation shall be cross-indexed in the database and linked to the relevant document image files for facilitating easy user access to requested documents. Cross-indexing shall include, but not be limited to, such data items as project number and title, document name, country name, contractor and publication date.

The database structure and fields may change to comply with revised USAID Directives in the near future. The contractor shall be required to change the database structure to meet the USAID requirements.

C.2.c. STORAGE OF HARDCOPY DOCUMENTS AND MICROFICHE.

The contractor shall store all original source paper copy documents (and historical, master and silver duplicate microfiche) for the period of time between the scanning (and previous contractor filming) of received documents and the retirement or destruction of these documents as determined by M/AS/ISS. A periodic report shall be prepared by the contractor to identify which documents or microfiche are retired or destroyed or transferred to NARA.

C.2.d. CONVERTING IMAGES TO COM FICHE FOR RETIREMENT TO NARA

The contractor shall convert scanned document images to Computer Output Microfilm (COM), or other appropriate mediums specified by USAID, to meet NARA archival requirements in accepting the Agency's permanent records. The contractor shall prepare a plan for processing the scanned images into COM fiche. The plan shall be submitted to M/AS/ISS for review and approval.

C.2.e. DATABASE MANAGEMENT AND TECHNICAL SUPPORT

The contractor shall provide database specialist, records management specialist and electronic publishing personnel who are experienced in managing database, intranet and Internet resources with the hardware/software toolset provided by the Agency's Office of Information Resources Management (M/IRM). M/IRM shall provide the necessary toolset and technical staff for operating and maintaining the computer hardware and software resources which will support the M/AS/ISS databases, related official Agency records repository and corporate web home page. Clearinghouse contract staff will use these toolsets to define, update, and maintain (1) the Project Documents Database and accompanying official document record repository, (2) HTML pages associated with the M/AS/ISS corporate web home page, and (3) electronic messages and documents accessed and disseminated through the AIDNET email, bulletin board and listserv/listproc systems.

The Project Documents Database shall be defined and updated by the contractor to manage information on official Agency document records maintained in paper, electronic, optical, audiovisual and microfiche formats.

The M/IRM toolsets currently include a SUN Unix Server with Solaris operating system, Basis Plus text and document management software, and Basis Web Browser software. M/IRM shall provide the contractor with sufficient electronic storage capacity to house the Project Documents Database and official Agency document records repository. M/IRM shall also provide the technology to make the database and repository accessible through the Agency intranet corporate web. M/IRM shall maintain adequate system performance and capacity sufficient to support records management service operations. M/IRM shall provide timely solutions which will quickly resolve system performance issues affecting the efficient operation of records management activities.

The contractor shall also provide computer specialist staff required to operate and maintain the clearinghouse local area network, workstations, printers, electronic and optical storage devices, scanning equipment, CD-ROM equipment and associated software for clearinghouse records management service applications.

The contractor database specialists shall create database products as required, including database reports and print formats, database exchange tapes, selected dissemination of information (current awareness) reports, computer-output-microfiche (COM) products and indexes, optical disk products (CDROM), document tracking, user services, and quality control, service evaluation and monthly management reports.

At the beginning of this contract, USAID shall provide the contractor with access to existing records management databases and official document records which are to be maintained by the contractor.

User statistics, database status, and computer system performance statistics will be reported each quarter in the records management service, performance management reports.

The contractor shall complete an annual hardware/software inventory of all computer, micrographics, and other information technology equipment, and software that has been purchased under the contract or received from USAID to support records management service operations. The contractor shall include, as part of the inventory, recommendations for information technology improvements.

C.2.f. RECORDS MANAGEMENT USER AWARENESS & TRAINING

The contractor shall provide training to Agency staff in accessing and retrieving information from the Project Documents Database CD-ROMs, and searching and retrieving the online database information through the Agency intranet corporate web. Training shall be conducted in individual and group sessions by the contractor for Agency staff in on-site USAID Mission and USAID/W office space.

More specifically, the contractor shall provide the training in the form of briefings, system orientations and special instructions, to assure that Agency Management, office managers, project managers, M/AS/ISS staffs and other Agency users know how to derive the greatest value from the Project Documents Database resource. The contractor shall emphasize computer workstation use, database access, search and report generation.

The contractor shall also produce training materials in the form of a brochure and manual (in paper and electronic form) to be sent to all users in the USAID/W offices and missions. The training will provide clearly written instructions on understanding and accessing the database and associated documents in microfiche and image format, in order to simplify and facilitate the expanded use of the Project Documents Database.

The contractor shall prepare a plan (for approval by M/AS/ISS) to develop and implement a proactive outreach, user education, communication and promotion activity for the Agency Records Management Services program.

C.2.g. PUBLICATION OF AUTOMATED DIRECTIVES SYSTEM

The contractor shall publish the Agency Automated Directives System (ADS) on CD-ROM technology, as directed by M/AS/ISS. Updated directives shall be provided semi-annually in electronic format by M/AS/ISS. The contractor shall format and tag the received ADS information as required by the CD-ROM software for proper display and retrieval by the user. The contractor shall produce semi-annual CD-ROMs for USAID Missions and development partners who have no on-line access to the Agency's intranet corporate web. The contractor shall use the current Romware software or a proposed, and subsequently approved equivalent or improved software program for building and accessing the ADS information on CD-ROM. Proposed software shall be compatible with Banyan Vines network environment, operate on Agency standard CD-ROM servers, and run under a Windows 3.1, DOS 6.0 or future M/IRM-specified operating environment. Technical direction shall be provided by M/AS/ISS to produce the semi-annual ADS CD-ROMs (DR-CD).

The contractor shall pay for any postage costs necessary to distribute the DR-CD publication to USAID staff. Non-USAID staff shall be required to purchase the DR-CD product on a cost recovery basis. A cost-reimbursable subscription service for DR-CD shall be offered by the contractor for non-USAID customers.

C.2.h. MIGRATING OF STORAGE AND PROCESSING TECHNOLOGY

The migrating of document storage and processing technology, such as changing the type of storage medium used to meet Agency and/or NARA requirements, if necessary or required by USAID, shall be done as directed by M/AS/ISS. If necessary, the contractor shall propose a plan for migrating to an alternative technology which is effective and cost-efficient for the creation, maintenance, disposition and preservation of electronic records.

C.2.i. SPECIAL PROJECT SUPPORT FOR INFORMATION SUPPORT SERVICES DIVISION (M/AS/ISS)

The contractor shall provide the additional special project services to support the records management program managed by the Information Support Services Division of the Administrative Services Office (M/AS/ISS). All technical direction for these services will be provided by M/AS/ISS.

The contractor shall conduct training for the Agency Bureau/Office file custodians and records management liaisons who are responsible for maintaining Agency official files or for USAID staff in the basic concept of records management such as managing and filing paper records on a daily basis and a basic understanding of the electronic records program. This will include training in managing and filing electronic document and file formats as specified by M/AS/ISS. The training program will include, but not be limited to, classroom instruction, hands-on training and workshops, development of user manuals, instructional materials, visual aids and course outlines. These services shall be provided by the contractor in USAID/Washington and on tdys to overseas Missions.

C.3. CLEARINGHOUSE STAFF TRAINING

The contractor shall provide training to the Clearinghouse contract staff in the following areas:

(1) Technical Skills

- Computer skills;
- Database search and retrieval skills;
- Electronic network skills, e.g. Internet, Gopher, Listserv;.
- Writing skills;
- Interview skills; and,
- Communications skills.

(2) Analytical Skills

- Information interviewing/needs assessment; and,
- Analysis/synthesis of development materials.

(3) Knowledge Enhancement

- New USAID program strategies and development experience;
- Recent donor experience;
- USAID and other donor organizational/program changes;
- USAID development partner programs; and,
- U.S. Government Agency international development programs.

C.4. SPECIAL CLEARINGHOUSE PROJECTS

The contractor shall be required to perform similar clearinghouse functions to support special project activities for USAID Bureaus and Offices.

C.4.a. CLEARINGHOUSE TECHNICAL ASSISTANCE SERVICES

The offeror shall be prepared to provide the following technical assistance services in support of USAID Bureaus and Missions, and USAID-funded programs.

- (1) Advising USAID-funded programs and offices on methods for enhancing their ability to acquire, process, organize and disseminate development experience, technical and other development information effectively and efficiently;
- (2) Providing technical assistance in performing needs assessments and requirements analysis for designing and operating documentation centers, information clearinghouses/centers and information programs with similar components for USAID projects, missions, offices, USAID-generated or supported information networks, and LDC institution programs and networks supported by USAID;
- (3) Assisting in the design of programs using development communications as a method for disseminating development information as a development resource; and,
- (4) Providing technical assistance in the organization, synthesis, access and dissemination of development experience and technical information into usable knowledgebases, paper and electronic information products on development activities, program evaluations and assessments, strategic and program plans, and research activities for access, analysis and dissemination to USAID staff and development partners.

These services shall be provided by the contractor in USAID/Washington and on tdays to overseas Missions and LDC institutions.

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C.4.b. OFFICE OF POPULATION

For the Office of Population (G/HPN/POP), the contractor shall acquire and distribute development information, as follows:

- (1) Select, purchase, and acquire population and health-related journals and other development materials, subject to the approval of G/HPN/POP.
- (2) Distribute the materials to approximately 125 USAID population and health specialists and officers overseas (and their development counterparts in the population sector).
- (3) Maintain a mailing list for these 125 population specialists and their counterparts.

For this special project, the contractor will be responsible for purchasing the journals and other development materials, packaging and mailing the acquired materials to the target audience. The government will pay for any necessary postage.

C.4.c. AFRICA BUREAU INFORMATION CENTER

The contractor shall provide the following support services for the Africa Bureau Information Center (ABIC) which is managed and operated by CDIE/DI's Research and Reference Services contract.

The contractor shall provide office space lease, utilities, office furniture, telephone equipment and phone lines, and reproduction equipment for up to six ABIC professional and administrative support staff, including Africa Bureau research liaison analysts under the R&RS contract. Adequate space shall be provided to house the 2,000 - 3,000 volume ABIC library collection, a reception area and conference room. The contractor shall also provide mailing list maintenance, printing and dissemination services for all ABIC publications, including African Voices, SD Abstracts, SD Development, and the Technical Paper Series. The contractor shall provide technical support services for ABIC personal computer workstations, hardware and software, including GENIS, a bibliographic database application which catalogs the ABIC library collection. The contractor shall provide courier services, office and computer supplies to support the ABIC operation.

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**C.4.d. OFFICE OF PROGRAM DEVELOPMENT AND STRATEGIC PLANNING
(G/PDSP)**

The contractor shall provide one full-time research assistant to assist G/PDSP with data entry, verification and analysis tasks related to the development, management, display and analysis of technical, financial and experiential development information. Data entry and data verification services will be performed on the USAID mainframe computer and IBM PC or compatible computer equipment provided by the contractor. The contractor shall perform data entry tasks on spreadsheet and database applications.

C.4.e. OFFICE OF WOMEN IN DEVELOPMENT

The contractor shall perform the following clearinghouse tasks for the Women in Development Office (G/WID).

- (1) Provide office and warehouse space, as appropriate, for storage of WID-related publications and materials.
- (2) Procure on-line database services and development materials for bulk distribution in response to WID information requests and requirements. All purchases of WID materials will be approved by G/WID prior to purchase.
- (3) Respond to about 150 on-demand requests from USAID Missions, LDC institutions and development counterparts (in the U.S. and overseas) for approximately 1,500 WID-related documents per year referenced in the USAID Development Experience System. Contractor will provide clerical staff, reproduction services, supplies, and postage to fulfill these requests.
- (4) Perform bulk-copy distribution requests from G/WID for about 1,500 copies of pre-selected, non-copyrighted WID publications and materials to be sent to USAID Missions, LDC institutions and development counterparts each year. The contractor will provide clerical staff, reproduction services, supplies and postage to fulfill these requests. Requests will be provided and forwarded from G/WID to the contractor for appropriate action.

C.5. CLEARINGHOUSE CONSULTANT SERVICES

The contractor shall provide consultant services (approximately 2 person months per year) to assist in preparation of information products on specialized development topics, designing new clearinghouse services and resources, developing and implementing special training sessions and workshops, analyzing clearinghouse operations for cost-effectiveness and improvements in management and administrative, staffing, systems, procedures and technologies, and providing technical assistance to the clearinghouse contract and USAID Missions to improve the Agency records management and institutional memory program, technical assistance, training, service and outreach activities.

C.6. CLEARINGHOUSE TEMPORARY STAFF

The contractor shall provide up to 2 person months of temporary help per year to assist with data entry, processing, records management, filing and administrative duties for the operation of the clearinghouse.

C.7. CLEARINGHOUSE PLANNING AND MANAGEMENT

C.7.a. TRANSITION PLANS TO RELOCATE THE CLEARINGHOUSE

The contractor shall work closely with the former clearinghouse contractor during a transition period (of up to two months) to ensure a smooth startup in the contractor's clearinghouse facility operations. USAID shall reimburse the contractor for the cost of relocating all equipment, furniture and development materials during the transition period, and will pay the former clearinghouse contractor to train the new contractor on current clearinghouse operations and procedures. The new contractor will absorb any site preparation costs required to establish the clearinghouse according to the contract specifications.

C.7.b. IMPLEMENTATION PLAN AND SCHEDULE

The contractor shall study the requirements of the clearinghouse contract by appraising present clearinghouse operations, information products and user services, current internal and M/IRM-supplied and supported computer operations, relevant Agency strategic program directions, plans, evaluations and studies, and by interviewing appropriate USAID officials and contractor organizations.

The contractor shall use these requirements to define a one-year implementation plan for the clearinghouse presenting a schedule for providing all services, products and functions described in this Statement of Work.

The one-year implementation plan and schedule shall be submitted to PPC/CDIE/DI in draft form for review and approval at the end of the first month of the contract. It shall be revised by the contractor during the next two weeks, with a final version due at the end of the second month. The contractor shall also be required to maintain an updated version of an annual implementation plan throughout the period of the contract

The plan will provide, at a minimum, the milestones that the contractor proposes for the following activities:

- (1) Identification and improvement of more efficient and cost-effective technologies, procedures, and operations in each area of the contract.
- (2) Design and implementation of an effective management information, user survey and reporting system which will provide the necessary accomplishment and performance information to verify achievement of deliverables under the estimated workload measures table and performance targets under the performance-based measures of this clearinghouse contract.
- (3) Design and implementation of any proposed database structure and data content changes for institutional memory and records management information systems.
- (4) Development and implementation of outreach, user awareness, training and user education programs which market, inform and explain the services and products provided by the clearinghouse to its primary clientele.
- (5) A plan for implementing improvements and contributions to the CDIE OnLine corporate web home page and CDIE contributions to the USAID Internet home page and Gopher sites.

C.7.c. OPERATIONS MANAGEMENT

The contractor will be responsible for establishing effective internal project management direction and controls necessary to:

- (1) Guarantee all requirements of the contract are satisfied in a acceptable time frame.
- (2) Adequately train contract staff in sufficient numbers to perform assigned projects within acceptable time limits and quality control standards for each phase and task of the contract.
- (3) Plan and monitor staff performance of all tasks.
- (4) Anticipate, identify, and resolve problems.
- (5) Improve the program efficiency of the clearinghouse.

The contractor will utilize input from the management information systems and customer surveys to improve the effectiveness and efficiency of each task area in the contract.

C.7.e. OPERATIONS MANUALS

The contractor shall maintain an Operations Manual covering all services and functions to be performed by the clearinghouse. All tasks of the contract scope of work will be performed by following the appropriate guidelines specified in the clearinghouse Operations Manual. The manual will include, but not be limited to, the following:

- (1) Procedures and methods for development material processing, scanning, storage, distribution, reproduction, etc.
- (2) Procedures, guidelines, forms and standards for acquisitions, thesaurus maintenance, desktop and electronic publishing publications, database operations and user services.
- (3) Standards, procedures, guidelines, and check points for quality control, customer surveys, and service evaluation.

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(4) Procedures and materials developed for outreach, training and user awareness and education functions.

(5) Guidelines and procedures for management review and reporting.

The contractor shall revise, as required, and maintain the Operations Manual throughout the contract. All revised sections will be submitted to PPC/CDIE/DI for review and approval. The contractor shall use the Agency-approved sections of the Operations Manual as a basis for his staff training prior to actual performance of functions in the clearinghouse. Copies of the final, up-to-date version of the entire Operations Manual are due at the end of the contract.

In conjunction with the maintenance of the Operations Manual, the contractor shall maintain non-subject authority files such as institutional names, projects, contracts, document types, countries, sectors, etc. as required for development experience material processing.

The contractor shall also maintain documentation on DEXS, Project Documents and other databases developed and maintained by the clearinghouse as part of the Operations Manual.

C.8. ADDITIONAL CLEARINGHOUSE SERVICES CONTRACT OPTION

USAID anticipates an expansion of its clearinghouse contract staff requirements to service Agency needs during this contract. Additional requirements may result in adding one or more staff in the following job categories: sector and geographic development information specialist, research assistant, writer/editor, cataloger, communication technician, database specialist, computer specialist, document analyst, records management specialist, or dissemination technician.

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Examples of this additional need would include, but not be limited to, (a) additional development information specialist and electronic publishing staff required by a Global Bureau Center to design and prepare a corporate web home page which organizes and presents the Center's development experience and technical information in an easily accessible and usable format; (b) an Agency Bureau/Office requiring development information specialists to synthesize development experience materials issued and created by their staff and programs which will become an electronic bibliography on the corporate web linked to paper copy and electronic dissemination of related development materials to a targeted audience; (c) a USAID Mission being closed down which requires development information specialists to review its development experience collection for inclusion in the Agency institutional memory system and central records management; (d) a USAID Mission evaluating a development activity with an information dissemination component and requires a development information specialist as part of the evaluation team to review the effectiveness of the dissemination program.

The hiring of additional staff shall include any necessary other direct costs to support the new hire including such items as hardware/software support, any required tdy travel, per diem and other related direct costs (ODCs), etc. These ODCs shall also be covered within the Additional Clearinghouse Services Option budget.

The priced-contract option shall be exercised as additional staff are needed by CDIE/DI to satisfy additional Agency requirements. Only the fixed fee amounts associated with additional staff and ODC costs exercised through this option shall be due the contractor by USAID.

C.9. PERSONNEL REQUIREMENTS

C.9.a. SKILLS REQUIRED

The following categories of personnel are required to perform the tasks described in the work statement:

- Project Director
- Operations Manager
- Development Information Specialists
- Research Assistants
- Records Management Specialists
- Document Analysts
- Writer/Editors
- Catalogers/lexicographers
- Database specialists
- Computer specialists
- Communications Technicians
- Dissemination Technicians
- Temporary Staff

The contractor's personnel must be knowledgeable about the information needs of the development community and about the identification, assessment, selection, and organization of information for development purposes.

The contractor shall provide personnel having skills in database entry, update, search, retrieval and reporting as well as knowledge of the relevant fields and disciplines encountered in development.

Development Information Specialists shall have as a minimum requirement a Bachelors's degree (or 4 years equivalent experience), preferably in international relations or related international development field; 2-3 additional years of work experience in the international development field, and knowledge of developing countries. Familiarity with the organization and operation of USAID is preferred. Previous development experience is desirable. Foreign language capability, especially in French and Spanish, is desirable.

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The contractor shall propose a development information specialist staff that will provide professional services supporting each of the following strategic development areas:

Economic growth, policy reform, private sector development, microenterprises, urban and regional planning;

Environment and natural resources, food and agriculture, and rural development;

Democracy and governance, human resource development and education;

Health, Population and Nutrition; and,

Humanitarian Assistance.

Development Information Specialists shall also be skilled in the following areas:

- Ability to evaluate, identify, select, analyze, synopsise and organize development materials to extract or highlight development experience findings.
- Ability to evaluate and select appropriate development materials.
- Demonstrated organizational, writing and communications skills.
- Ability to work effectively both as a team member and individually, and to plan, organize and use time effectively.

Development Information Specialists shall also have the following technical knowledge:

- Experience in working with information systems, including on-line database entry, update, search and retrieval, and reporting, CD-ROM and Internet WWW and Gopher searching, and using other electronic telecommunications and information systems.
- Familiarity and knowledge of database software (Basis Plus preferred) and familiarity with information access systems such as Internet (Netscape preferred).
- Experience with personal computing: specifically word processing, spreadsheets, databases and email (Wordperfect and Lotus preferred).

Offerers shall be prepared to submit samples of the writing skills of the proposed development information specialists, if requested.

Records Management Specialists shall have a Bachelor's degree in information science, library science, or four years of equivalent experience in the records management (RM) field. RM specialists shall have a basic understanding of overall records management roles, basic principles of recordskeeping which include creation, active management, archival and disposal functions of records management. Familiarity with all aspects of USAID official project records and the USAID organization is preferred. General knowledge of NARA requirements is highly desirable. Specialists must have an expertise in indexing, retrieval, storage, and disposal of paper, microfilm and electronic records. Experience with planning, developing, managing and evaluating all aspects of CD-ROMs, optical disks, micrographics, microfilming and other information technologies and database systems is required.

Document Analyst/Document Preparation Clerk shall have at least two years of progressively responsible experience in word processing, Internet, database and other information technology. This staff shall have the skills to research, elicit and correlate information from many sources for use in reference, correspondence and presentation. Experience in loading data from, and scanning source documents into a computerized data base highly desirable. Requires a basic understanding of records management functions such as disposition, indexing, retrieving, archiving.

Catalogers and Lexicographers shall have a minimum of an M.L.S. degree or equivalent work experience. A bachelor's degree in a subject relevant to social and economic development or international relations is also preferred. Knowledge of the operation of USAID and other foreign assistance programs is desirable. Previous development work experience is desirable. Knowledge of international development materials is mandatory. Cataloger experience with AACR2 cataloging guidelines is preferable. Lexicographical experience in the construction and maintenance of development-related thesauri, such as the USAID Thesaurus, OECD Macrothesaurus or the UNESCO Thesaurus.

Catalogers and lexicographers shall also be skilled in the following areas:

- Ability to evaluate and select development information materials.
- Experience in database searching of on-line and CD-ROM systems and products using several different software languages.
- Experience in searching database services such as DIALOG, Internet, etc.
- Experience with microcomputer applications, particularly word processing (Wordperfect preferred), spreadsheets (Lotus preferred), and integrated library system software.
- Familiarity and knowledge of database software (Basis Plus preferred).
- Strong organizational, interpersonal, oral and written communications skills.
- Ability to work effectively as an individual and as part of a team.

Research Assistants, Communications and Disseminations Technicians

A research assistant shall support the work of the development information specialists. Communications technicians shall be performing desktop and electronic publishing functions. Dissemination technician staff shall be performing on-demand and bulk document distribution functions, and providing customer service functions for clearinghouse patrons. Each shall have a minimum of an Bachelors degree in international relations, library science, information science, communications, English, journalism, a related field, or four years equivalent work experience. Knowledge of international development and foreign assistance programs through education or experience is desirable.

Research assistants and technicians shall also be skilled in the following areas:

- Ability to evaluate and select development information materials (Research Assistants and Communications Technicians only).
- Experience with microcomputer applications, particularly word processing (Wordperfect preferred) and spreadsheets (Lotus preferred).
- Strong written, proofreading and editing skills.
- Ability to work effectively as an individual and as part of a team.
- Experience using desktop publishing software (Pagemaker preferred) and electronic publishing software (HTML and Internet home page experience required) (Communications Technicians only).
- Excellent organizational and interpersonal skills.

Database Specialists/Computer Specialists must be experienced and skilled in the following areas:

- Bachelor's degree in computer science, information management, information science, related degree or 4 years equivalent experience.
- 2 to 3 years additional experience in relational, textual and document management database design and administration (Basis Plus preferred) and Internet-related software (e.g. Basis Web Browser, Netscape). (Database Specialists only).
- 2 to 3 years additional experience in personal computer programming and analysis and LAN (Novell or Banyan) environment development and administration. (Computer Specialists only)
- Strong PC-based programming ability and experience using such packages as Dbase, Clipper, FoxPro, Basis, Delphi, Paradox, Access, etc.
- Extensive knowledge and application of a variety of PC software packages, including DOS, Windows, Wordperfect, Lotus, Word, Excel, etc.
- Strong organizational, interpersonal and written communications skills.
- Ability to work independently and effectively as a member of a team.

Writer/Editors must be experienced and skilled in the following areas:

- Bachelors degree in journalism, English, technical writing, international relations, a related degree or equivalent work experience.
- 2 to 3 years additional editorial and publications experience.
- Knowledge of desktop publishing (Wordperfect and Pagemaker preferred).
- Knowledge of electronic publishing (HTML and Home Page experience preferred).
- Demonstrated writing, editing, research and analysis skills.
- Knowledge of international development issues and the organization and operation of USAID preferred.
- Knowledge of database software, CD-ROM technology and Internet.
- Ability to communicate effectively, both orally and in writing.
- Foreign language proficiency desired (French preferred).
- Ability to work independently and effectively as a member of a team.

Temporary staff shall be required to fill-in from time to time to replace permanent secretarial staff, administrative assistants and receptionists which must provide full-time coverage of clearinghouse and program operations.

C.9.b. CROSS-TRAINING

The contractor shall develop a cross-training program where clearinghouse contract development information specialist, writer/editor, cataloger/lexicographer, communications and dissemination, records management specialist and document analyst professional staff shall be capable of performing and supporting each other's work functions, to respond to changing work load conditions, shifting job priorities and program emphasis, and to backstop short-staffed research and reference services areas, as required. It is extremely important that the proposed professional staff be "interchangeable" to allow USAID maximum management flexibility to respond to changing information service demands.

C.10. KEY PERSONNEL

The following positions are designated key personnel:

Project Director
Operations Manager
Records Management Supervisor

The Project Director shall have:

- Masters degree or equivalent years in experience in information management, information science, international relations, or related area;
- 10 - 15 years additional experience in planning, budgeting, and evaluating all aspects of an information clearinghouse operation and managing a multi-disciplinary team of development information specialists as described in the scope of work;
- Extensive experience in development and management of information programs in the public and/or private sector;
- Previous experience with USAID (preferred) or other development assistance programs.
- Experience in managing technical assistance programs to support information center, library and clearinghouse operations in developing countries;
- Experience in directing research and development programs in information science for use by developing countries;

- Knowledge (and preferably in-depth familiarity) with USAID or other international development programs and policies, particularly as they affect the provision of timely and effective management and dissemination of development experience information in developing countries; and,
- Knowledge of information technology and computerized systems, including such technologies as the Internet, CD-ROM, electronic publishing, and local area networking.
- Experience in negotiating and establishing cooperative programs with development organizations for information sharing, networking and donor/development partner coordination.

The Operations Manager shall have:

- Masters degree in information management, information science, library science, international relations, or related area;
- 5 to 7 years experience in project management or managing all aspects of daily information clearinghouse operations;
- Extensive experience in development and management of information programs in the public and/or private sector;
- Previous experience with USAID (preferred) or other development assistance programs.
- A working knowledge of information technologies and methodologies required to support clearinghouse operations defined in this scope of work, preferably Basis Plus, Basis Web Browser, Minisis and industry standard personal computer and Internet-related software packages;
- Experience in performing requirements analysis of new information management requirements for clearinghouses and information centers;
- Experience in evaluating and improving the effectiveness of information clearinghouse operations;
- Knowledge of the development experience information produced by USAID, other donor and development partner organizations; and,
- Working knowledge of Federal information policies and their application to information clearinghouse policies and operations as a U.S. Government-funded contract.

The Records Management Supervisor shall have:

- Bachelor's degree in information management, information science, library science, international relations, or related area;
- 5 to 7 years experience in planning, developing, managing and evaluating all aspects of an automated records management program for a highly decentralized organization;
- Extensive experience in development and management of information programs in the public and/or private sector;
- Previous experience with USAID (preferred) or other development assistance programs.
- Working knowledge of all technical and managerial aspects of scanning and micrographics technologies, including industry (ANSI) and government (CFR, NIST, National Archives, USAID) standards requirements for electronic, optical and micrographics records production, reproduction, storage, dissemination and destruction;
- Experience in supervising records management specialist and document analyst staff;
- In-depth knowledge of all aspects of USAID official project records, the USAID organization and its records management program preferred; and,
- Working knowledge of database management software (Basis Plus, Basis Web Browser and Minisis preferred), Internet-related software (Netscape preferred) and personal computer word processing, spreadsheet, database management, project management and graphics presentation software (Lotus 1-2-3, Wordperfect, Microsoft Access, Foxpro, Microsoft Access, PowerPoint and Project preferred).

C.11. SECURITY

C.11.a. SECURITY CLEARANCES

A Secret security clearance is required for all contract personnel who process Agency development experience materials, access Agency computer systems or local area networks, or who maintain USAID documents and development information resources. Clearances shall be obtained from the Defense Investigative Service under a Memorandum of Understanding (MOU) with USAID. FAR clause 52.204-2 applies to this contract except that all references to the Department of Defense Industrial Security Manual (ISM) should reference the Department of Defense National Industrial Security Program Operating Manual of January, 1995.

A Secret facility clearance is required for the Development Experience Clearinghouse contractor. This contract will require access to foreign government information, official use only information and Sensitive But Unclassified (SBU) information. In performing this contract, the contractor will (1) have access to classified information only at a Government activity and (2) perform services only. Any information pertaining to this contract shall not be released for public dissemination except as provided by the Industrial Security Manual or unless it has been approved for public release by appropriate U.S. Government authority. Proposed public releases shall be submitted for approval prior to release through the USAID, Legislative and Public Affairs Office, LPA/AA, Room 4889, Washington, D.C. 20523.

C.11.b. SECURITY GUIDANCE

The following security guidance shall apply to this contract:

- No one shall be issued a USAID building pass/ID card which allows unescorted access in USAID work space until they have received a security clearance and security briefing.
- Access to classified information will be controlled by USAID direct hire employees. Specific guidance will be given by CDIE/DI.
- All sensitive and classified information will be properly marked by USAID prior to disclosure to the contractor.
- All discrepancies, doubts or questions concerning the proper sensitivity or classification level of information must be resolved by CDIE/DI..
- The contractor shall insure that individuals entering on duty with USAID under the contract will have an appropriate security clearance, attend an initial USAID IG/SEC security briefing, sign the Standard Form 312, Classified Information Nondisclosure Agreement, and obtain a USAID building pass/ID card.
- Upon termination from the company or contract, the company shall ensure that the individual contractor receives a security debriefing, signs the Security Debriefing Acknowledgement portion of the SF 312, and returns the USAID building pass/ID card.
- All security violations will be reported to the COTR as well as to the company security office.

C.11.c. OFF-SITE CONTRACTOR TECHNICAL RESOURCE AND SECURITY REQUIREMENTS FOR ELECTRONIC SBU INFORMATION

The Development Experience Clearinghouse contract will provide services from an off-site (non-USAID office space) location and shall require access to the Agency's Internet Gateway and the internal Agency information network (AIDNET). The contractor shall be required to process electronic Sensitive But Unclassified (SBU) information. The following paragraphs stipulate the technical resource and security requirements which shall be provided/met by the DEC contractor to establish the appropriate electronic access links to these Agency information resources.

OFF-SITE TECHNICAL RESOURCE REQUIREMENTS

(a) Applicability. This clause applies when the Contractor's off-USAID-site performance of the contract's statement of work requires connectivity to USAID information technology resources.

(b) Installation, Configuration, and Maintenance Provisions for Network Connectivity.

(1) Internet Connection. When the Contractor requires services supportable via the USAID Internet gateway, the Contractor shall install, configure, and maintain its own separate connection to the Internet. The COTR will ensure that the required USAID information is placed on USAID public systems, and will provide the Contractor with a list of Internet addresses. The Contractor's Internet connection will be restricted to Internet E-mail and Internet access to USAID public systems.

(2) AIDNET Connection. When the Contractor requires services that are NOT supportable by an Internet connection, the Contractor shall procure, install, configure and maintain its own separate connection to the non-public USAID network (AIDNET) and other USAID corporate systems through one of the means indicated below. For all cases, no simultaneous connection by the Contractor to any other external systems is allowed.

(i) Via a router, or

(ii) Via a (LAN or PC) dial-up link.

Unless authorized in the contract schedule, the Contractor shall request, through the COTR, that M/IRM and the office with functional authority over the particular corporate system(s) authorize access.

Unless otherwise specified in the contract schedule, USAID information technology support to the Contractor shall be limited to provision of appropriate logon IDs and requisite access to the USAID network (AIDNET) and corporate systems. Access will be limited to the data and systems essential for contract performance.

(c) Security

(1) General Contractor Responsibilities. The Contractor acknowledges that:

- (i) The Contractor assumes responsibility for protecting the confidentiality, integrity, and availability of USAID information under its control,
- (ii) The Contractor is responsible for restricting access at its site to USAID Information to only authorized users, and
- (iii) The Contractor shall adhere to the standards and requirements of USAID Automated Directives system (ADS) Chapter 551, Automated Information Systems Security.

(2) Contractor Clearance and Authorization Levels. USAID will designate and inform the Contractor of appropriate clearance and authorization levels for individuals and facilities.

(3) Specific Technical Security Responsibilities.

- (i) All information provided via USAID public systems or exchanged without encryption via the Internet will be strictly non-sensitive in nature.
- (ii) When exchanging sensitive but unclassified (SBU) information via Internet facilities, the configuration must include USAID-approved encryption for transmission, as specified in ADS Chapter 551. The Contractor is instructed to contact the Information Systems Security Officer (ISSO) for USAID for site-specific guidance and approval.
- (iii) When the Contractor's work requires more than standard functionality, or access requirements beyond the user level, or access to SBU information, and the Contractor requires a connection to AIDNET via a router or dial-up link, then additional security measures may be required by USAID. These measures may include advanced authentication and/or encryption.

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(iv) When Contractor personnel have no further anticipated need for access to a particular system, the Contractor shall terminate individual access privileges within one working hour.

(4) Contractor Options for Physical Safeguards When Handling SBU Data in Electronic Form. When the Contractor is required to handle SBU information in electronic form and there is an established need for services beyond E-mail (referred to as enhanced interoperability), then adequate physical security must be established. Any one of the options listed below will be accepted as proof of adequate facility security at the Contractor's site. The USAID ISSO will authorize enhanced interoperability with USAID systems only after implementation of an option.

(i) A facility clearance issue by Defense Investigative Service (DIS) that covers the facility in which all connected system(s)/terminal(s) are located and includes authorization to store classified data in that facility. Facility clearances are granted by the DIS Clearance Office (DISCO) in accordance with DOD's National Industrial Security Program (NISP).

(ii) A USAID-approved physical security environment, as specified in ADS Chapter 551. The Contractor is instructed to contact the ISSO for USAID for site-specific guidance and approval.

(iii) Use of USAID-approved encryption technology to store SBU data.

In addition, physical access control requirements for the handling of SBU information, in hard copy, as required by 12 FAM 540 and the USAID/General Notice by IG/SEC dated November 9, 1995, must be adhered to by the Contractor.

(d) Change. Changes to the established configuration must be approved by the USAID ISSO prior to implementation to ensure continuity of security measures and to prevent the introduction of new security vulnerabilities.

C.12. REPORTING

The contractor shall develop and maintain a Management Information System which records all clearinghouse service requests, time spent on clearinghouse functions and activities and provides the required information for CDIE/DI management to produce quarterly and annual Bureau/Office User Fee accountability reports. The MIS will also support weekly, quarterly and annual reporting requirements of this contract, in addition to, ad hoc reporting requirements identified by CDIE/DI and M/AS/ISS.

C.12.a. MANAGEMENT REPORTS

The Contractor shall submit a weekly narrative report (1 copy) which summarizes and highlights significant clearinghouse staff activities started or completed during the previous week, in addition to, significant planned activities, deliverables, meetings in the upcoming week. This report shall be used by CDIE/DI and M/AS/ISS to prepare weekly management reports to CDIE and AS management, respectively.

The contractor shall prepare quarterly performance reports (5 copies) for the first three quarters of the each contract year (see "Inspection and Acceptance" Section of the contract).

The contractor shall submit an annual report (5 copies) which shall summarize the achievements, shortfalls, problems and recommended solutions, evaluation of the contract work to date and proposed plans for the remainder of the contract. The annual report shall contain appropriate statistical summaries of each service area of the contract.

All reports shall be submitted to the Project Officer, Development Experience Clearinghouse Contract, Agency for International Development, PPC/CDIE/DI, Room 209, SA-18, Washington, D.C. 20523.

C.12.b. FINANCIAL REPORTS

The contractor will document the expenditure of contract funds for all tasks in a monthly financial management report which will be due no later than ten (10) work days after the end of the calendar month. Each report will show expenditure of funds for the reporting period and the amount accumulative to date including the current reporting period. Separate reports will be submitted for operating expense-funded and program-funded activities. Each report will account for expenditures separately for activities funded by CDIE/DI, M/AS/ISS and buy-in activities from other Agency offices.

Itemization of expenditure will be defined to the point that:

- (1) Work performed by the contractor and subcontractors on each task along with amount of reimbursement for such work is identified,
- (2) Subcontractors are identified when used, and
- (3) Work performed on each task bears a direct accountability relationship to reimbursement claimed and cumulative funds expended.

C.12.c VOUCHERS

Two (2) reimbursement vouchers, one for operating expense-funded activities and one for program-funded activities, for all tasks performed under the contract will be submitted monthly. The operating expense voucher will reflect a separation of claims against M/AS/ISS operating expense funded activities. The program expense voucher will reflect a separation of claims against PPC/CDIE/DI and other program-funded activities.

C.13. QUALITY CONTROL

The contractor shall continually perform quality control functions by reviewing the selection of development experience materials, information, or data for the development experience collection and their relevance to the Agency's strategic program directions.

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USAID shall monitor the contractor's performance in selecting relevant material and in meeting the specified response times for requestors by reviewing the quarterly performance reports, and holding quarterly and annual management review meetings. The Contractor shall be responsible for preparing appropriate briefing materials for the management review meetings which demonstrate the quality level of the development experience database, use of the database by primary audiences and response times and backlog level for user requests.

C.14. EVALUATION

There shall be an evaluation of the Development Experience Clearinghouse contract beginning at the end of the thirty-sixth month after the contract award and as otherwise deemed appropriate by USAID throughout the performance of the contract.

C.15. FACILITIES AND NON-EXPENDABLE FURNITURE AND EQUIPMENT

C.15.a. CONTRACTOR-PROVIDED FACILITY

The contractor shall provide facilities, within a 50-mile radius of CDIE/DI offices in Rosslyn, Virginia, for the performance of clearinghouse tasks described in this work statement.

The facility must be capable of providing two-hour priority special delivery of USAID development experience and information materials to USAID offices located in Washington, D.C. and Rosslyn, Virginia.

The facility should accommodate all professional and support personnel and equipment at one central location with the exception of the warehouse operation, which can be located at a second site (within 50 miles of Rosslyn, Virginia).

The facility should accommodate the installation of all government-furnished equipment, which includes the hardware (and software, where applicable) listed in the Clearinghouse Furniture, Equipment and Software Inventory section.

The contractor shall provide access to a fire-safe vault, which is humidity- and temperature-controlled for the storage of master microfiche, CD-ROMs, database backup tapes and diskettes, and publication negatives.

The contractor shall provide the leased office space, utilities, office equipment, reproduction equipment, supplies, telephones, furniture, file cabinets, paper, toner, etc. to support the professional, technical and administrative support staff.

Activities are to be performed on an on-site and off-site basis during USAID's normal working hours, Monday through Friday (excluding holidays), between 8:45 am and 5:30 pm.

C.15.b. FURNITURE, EQUIPMENT AND SOFTWARE

The Agency shall transfer the extant inventory (see section C.18 for inventory of furniture, equipment and software) of office furniture, office equipment, telephone and telephone system, computer equipment, LAN equipment, desktop and electronic publishing equipment, CD-ROM equipment, telecommunications equipment, scanning equipment, reproduction equipment, microfiche equipment, laser printers and associated computer software from the incumbent clearinghouse contractor for use under this clearinghouse contract (see Clearinghouse Furniture, Equipment and Software Inventory). The contractor shall acquire and provide new and updated computer hardware/software, office furniture and equipment acquisition for all contract staff and services during the contract.

The contractor shall establish and maintain an inventory and maintenance schedule for all government-furnished equipment used in providing clearinghouse services. The initial list shall be transferred from the incumbent contractor and developed in conjunction with the COTR. The contractor shall, as necessary, arrange and provide for equipment maintenance and service call agreements for said equipment (with the exception of the library photocopying and microfiche reader/printer equipment). The contractor shall complete an annual inventory of all furniture, equipment and software that has been purchased under the contract or received from USAID to support clearinghouse operations.

Computer hardware/software acquisitions support shall be provided to the clearinghouse contract processing staff for computer workstations, desktop publishing, local area network systems, electronic publishing, CDROM publishing, laser printing, color printing, on-line communications, CDROM readers, hardcopy scanning and reproduction, and word processing.

C.16. TECHNICAL DIRECTION

Performance of the work hereunder shall be subject to the technical directions of the cognizant USAID Technical office indicated on the Cover Page of the contract. As used herein, "Technical Directions" are directions to the contractor which fill in details, suggest possible lines of inquiry, or, otherwise complete the general scope of the work. "Technical Directions" must be within the terms of this contract and shall not change or modify the terms in any way.

C.17. ESTIMATED WORKLOAD MEASURES FOR CLEARINGHOUSE CONTRACT

C.17.a. DEVELOPMENT EXPERIENCE SERVICES, SPECIAL CLEARINGHOUSE PROJECTS, TRAINING, CONSULTANT AND TEMPORARY SUPPORT (Estimated 85% of total contract workload)

CLEARINGHOUSE FUNCTION	PRINCIPAL ACTIVITIES (Number of Events per Year)	% TOTAL WORK-LOAD
Document Acquisition, Selection, Review, Analysis and Cataloging	<ul style="list-style-type: none"> * 4,500 current (within last 5 years) and 3,000 retrospective (older than 5 years) USAID-produced or USAID-funded development experience documents, reports and publications acquired each year (Represents acquisitions of USAID reports for the Development Experience System (DEXS). Also includes audiovisuals (100), and classified reports (100)). * 300 research, evaluation, and institutional activities each year. * 1,500 strategic and intermediate objective, program and other development activities each year. * 250 retrospective (prior years) strategic and intermediate objective, program and other development activities each year. * 150 non-USAID development-related materials in priority USAID program areas acquired each year, e.g. GAO reports, CD-ROM and on-line database products. Other development organization reports and studies. 	20%

Summarizing Development Experience Reports	<ul style="list-style-type: none"> * 700 original summaries prepared first year. Decrease by 100 each subsequent year. * 300 edited (author-supplied) summaries first year. Increase by 100 each subsequent year. 	6%
Indexing Development Experience Materials	<ul style="list-style-type: none"> * 4,500 development experience reports indexed each year. * 100 audiovisuals indexed each year. * 100 classified USAID reports indexed each year. * 300 research, evaluation, and institutional activities indexed each year. * 1,500 strategic and intermediate objective, program and other development activities indexed or hypertext linked each year. * 250 retrospective (prior years) strategic and intermediate objective, program and other development activities indexed or hyper-text linked each year. * 500 development experience records on DEXS re-indexed each year. 	2%
Scanning Development Experience Reports	<ul style="list-style-type: none"> * 4,500 development experience reports image-scanned first year. Documents scanned reduced by 500 for each subsequent year, as an equivalent number of electronic documents are received in lieu of paper. * 1,000 development experience reports OCR-scanned each year. 	9%

<p>USAID Thesaurus of Development Descriptors</p>	<ul style="list-style-type: none"> * 100 additions, modifications, notes added to on-line Thesaurus each year. * USAID Thesaurus maintained as on-line database. * 150 copies of printed version of USAID Thesaurus produced once every two years, beginning with first year of contract. 	<p>1%</p>
<p>Electronic Dissemination of Development Experience</p>	<ul style="list-style-type: none"> * One electronic, special bibliography in each USAID strategic program area per year (250 paper copies). * Monthly, electronic, acquisitions lists of development experience reports (250 paper copies). * 350 copies of annual CD-DEXS CD-ROM publication. Reduce by 50 copies each subsequent year. * 250 HTML pages created or modified each year. * Editing and layout services. * Writing, editing, formatting and graphics production for disseminating CDIE and Agency development experience materials and information via the following electronic dissemination channels: CDIE OnLine Home Page, Agency intranet corporate web, USAID Internet Gopher, WWW and Listserv applications. 	<p>15%</p>

Responding to Development Experience Requests	<ul style="list-style-type: none">* Distribute approximately 100,000 documents, publications, and development experience materials, on-demand and bulk distribution, per year.* Mailing list development and maintenance - Recipients database.	10%
Proactive Outreach and Communications Services	<ul style="list-style-type: none">* Brochures and promotional materials.* Videotapes.* 2,000 copies of Requests and Responses monthly newsletter printed and distributed internally in USAID.* 150 copies of monthly New This Month newsletter reproduced and provided to DIC.* On-demand reproduction and limited distribution of special R&RS issues briefs (six per year - 150 copies - 25% external and 75% internal distribution).	3%

Training and User Education	<ul style="list-style-type: none"> * Training materials for DEXS, CD-DEXS, CDIE OnLine Home Page, etc. <ul style="list-style-type: none"> - User Manuals (150) - Operations Manuals (50) - Quick-help guides (500). * Instructional materials. * Visual aids. * Course outline. * On-line tutorial. * Periodic user awareness announcements. * Annual user group meeting. * Development Experience Clearinghouse information resources, products and services training (12 sessions per year). 	3%
Knowledgebase Management and Technical Support	<ul style="list-style-type: none"> * Managing CDIE database, intranet and Internet resources. * Managing clearinghouse local area network, computer equipment and software. * Data entry, verification and database maintenance. * Create database products in multiple formats and on multiple media. * Implement data exchange agreements. * Annual hardware/software inventory. 	10%

Clearinghouse Staff Training	<ul style="list-style-type: none"> * Training staff in the following areas: <ul style="list-style-type: none"> - Technical skills - Analytical skills - Knowledge enhancement. 	2%
Special Projects - Technical Assistance and Consulting	<ul style="list-style-type: none"> * 4 technical assistance and consulting activities per year. (2 months consulting time per year. 4 overseas tdys per year.) * Helping the Agency and USAID-funded projects enhance their ability to acquire, organize, access, process, use and disseminate development information effectively and efficiently. * Performing needs assessments and requirements analyses for designing and operating clearinghouses, documentation centers, information and institutional networks. * Improving Agency records management and institutional memory programs. * Organizing, synthesizing and disseminating development experience and technical information into usable knowledgebases. 	2%

<p>Special Projects - Other Activities</p>	<ul style="list-style-type: none"> * Select, purchase and distribute approximately 7 population and health-related journals to approximately 125 USAID population and health specialists for G/HPN. * Provide mailing list support, print and disseminate ABIC publications. <ul style="list-style-type: none"> - African Voices (2500 copies each quarter; 90% external, 10% internal distribution). - SD Abstracts (1250 copies each quarter; 25% external, 75% internal distribution). - SD Developments (550 copies each quarter; 100% internal distribution). - Technical Paper Series (2 paper per year, 500 copies, 50% internal, 50% external distribution). * Provide ABIC facility, utilities, furniture, telephones, courier service, office and computer supplies, reproduction equipment for six ABIC staff, reception area, conference room and 3,000 volume library collection. * Research assistant services to G/PDSP. * Provide G/WID with warehouse space for WID-procured materials. * Procure database services and development materials for G/WID. * Respond to 150 on-demand requests for approximately 1,500 WID-related documents per year from the DEXS. * Bulk distribute approximately 1,500 copies of pre-selected WID publications. 	<p>2%</p>
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Management, Administration, Planning, Evaluation and Temp Support	<ul style="list-style-type: none">* Contract oversight.* Budget oversight.* Reporting (weekly, monthly, annual).* Deliverable monitoring.* Direction and leadership of project.* 2 months temp services per year.* Evaluation of services, products, etc.* Planning.* Quality control.* Support, secretarial services.* Staff supervision.* Staff evaluation.* MIS development and maintenance.	15%
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C.17.b. AGENCY RECORDS MANAGEMENT SERVICES
 (Estimated 15% of total contract workload)

FUNCTION	PRINCIPAL ACTIVITIES (Number of Events per Year)	% TOTAL WORKLOAD
Records & Image Management Services (RIMS)	<ul style="list-style-type: none"> * Process an average of 20,000 documents per year (average 23 pages in length), including formatting, batching, duplicate-checking and image-scanning. * Produce average of 2 RIMS CDs per month. * Response to user for specific reports in hardcopy form. 	38%
Maintenance of Project Documents Database	<ul style="list-style-type: none"> * Data entry and verification of all acquired documents. * Maintain Project Documents Database. * Provide database access to online users. * Maintain and update M/AS/ISS home page with the latest information for Agency users. 	15%
Storage of Hardcopy Documents and Microfiche	<ul style="list-style-type: none"> * Review and prepare reports that identify which documents or microfiche are to be retired or transferred to NARA. 	5%
Converting images to COM Fiche for Retirement to NARA	<ul style="list-style-type: none"> * At least twice a year, with approval of M/AS/ISS, convert images to COM Fiche. 	5%

Knowledgebase Management and Technical Support	<ul style="list-style-type: none"> * Managing M/AS/ISS database and intranet (corporate web) resources. * Managing clearinghouse local area network, computer equipment and software. * Data entry, verification and database maintenance. * Create database products in multiple formats and on multiple media. * Implement document retirement schedule agreements. * Annual hardware/software inventory. 	10%
Records Management User Awareness and Training	<ul style="list-style-type: none"> * Provide an average of five training sessions per year on CD-ROM technologies and Project Documents Database access through Agency corporate web per year. 	10%
Publication of Automated Directives System	<ul style="list-style-type: none"> * Produce an average of 200 ADS CD-ROMs, twice a year. * Develop and maintain ADS CD-ROM mailing list. * Distribute CDs semiannually to overseas Missions and other approved USAID/Washington addressees. * Distribute ADS CD-ROMs and receive subscription fees for external customers requests. 	15%
Special Project Support for Information Services Division (M/AS/ISS)	<ul style="list-style-type: none"> * Provide an estimated one training course per month on the Agency Records Management Program to selected Agency staff. 	2%